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ABSTRACT

PETC-III is one of several instructional systems currently under development in the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory. The PECT-III materials include training strategies and procedures plus participant instructional materials for use with a select group of educators in a workshop setting. PETC-III carries with it a change support process termed organizational development. This document presents the evaluation report for the pilot stage of the PETC-III system's development. This evaluation was conducted to facilitate judgments about the efficacy of materials, strategies, and the accompanying change support process that comprise the PETC-III instructional system. The first chapter describes the system's history and objectives. The second chapter describes the pilot test workshop study, including methods of obtaining information, and presents the empirical evidence collected from the workshops. The next chapter describes the process of the expert external review conducted on the PECT series and presents a summary of the review critiques. This is followed by a description of the search for alternative training programs on the market and a comparative analysis of the search results. The final chapter contains a summary of the findings. Appendices include the Improving Teaching Competencies Program's product development model, questionnaires used in the pilot test workshops and documents pertaining to the implementation and results of the external review and alternatives search. (RC)

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PILOT MILESTONE REPORT FOR PREPARING EDUCATIONAL TRAINING CONSULTANTS: ORGANIZATIONAL DEVELOPMENT (PETC-III)

Improving Teaching Competencies Program

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PREFACE

This publication is one of a series of technical evaluation reports issued by the Northwest Regional Educational Laboratory to document evaluation findings for selected products. The subject of this report is *Preparing Educational Training Consultants, Organization Development (PETC-III)*, an instructional system developed in the Improving Teaching Competencies Program.

This technical report presents the data collected about the system and its objectives during the 1974-75 field tests. The information has been used in subsequent revisions of the system by its developers, René Pino and Kuth Emory.

The report has undergone an institutional technical review conducted by Laboratory specialists external to the Program.

Lawrence D. Fish
Executive Director

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Bill Ward and Marilyn Rieff, Office of Field Relations of the Improving Teaching Competencies Program, who acquired and set up the pilot test sites. Our thanks also to Jack Tesmer, Vera Larsen and Jim Forneris who offered their assistance in the workshop installations.

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INTRODUCTION

Preparing Educational Training Consultants: Organizational Development (PETC-III) is one of several instructional systems currently under development in the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory (NWREL). The *PETC-III* materials include training strategies and procedures plus participant instructional materials for use with a select group of educators in a workshop setting. *PETC-III* also carries with it a change support process termed organizational development (OD).[1]

PURPOSE OF THE EVALUATION

The development model employed by the Improving Teaching Competencies Program divides the production of an instructional system into five developmental phases (planning, pilot, interim, field test and outcome). These phases are fully spelled out in Appendix A. This document presents the evaluation report for the pilot stage of the *PETC-III* system's development.

The main purpose for conducting this evaluation was to facilitate judgments about the efficacy of the materials, strategies and the accompanying change support process that comprise the *PETC-III* instructional system. Specifically, evaluation activities collected information so judgments could be made about the:

1. Efficacy and the quality of *PETC-III*

[1]Organizational development is a strategy for organizational change. It is a set of practices that has evolved in industrial, governmental and (more recently) educational settings. The purpose of organizational development is to improve organizational health and effectiveness. The aid of *PETC-III* is to train educational personnel who will then provide organizational training and consultation to local educational organizations.

2. Educational need for the instructional system and the proposed change support process

3. Sufficiency and feasibility of the instructional system and the proposed change support process in regard to goals, content, strategies, disseminability and costs

4. Claims for the superiority of the instructional system and the proposed change support processes in comparison to existing alternatives

The function of this report is to present to decision-makers at NWREL and the National Institute of Education (NIE) who are not directly involved in the development or evaluation of the instructional system, a summary of the evaluation activities and findings provided to the developers during the pilot stage.

INFORMATION NEEDS OF THE EVALUATION

This evaluation sought information about the need for, alternatives to, and the sufficiency and feasibility of the *PETC-III* instructional system and its proposed change support process.[2] To facilitate the gathering of this information, evaluation issues were expressed in a series of questions. The questions have been sorted into three categories. The first category relates to trainees' judgments about the instructional system and *PETC-III* training. The second category includes questions concerned with the adequacy of the instructional system from the perspective of outside reviewers. The third category of questions relates to existing alternatives to the instructional system. These questions are listed below:

Questions Related to Trainee Judgments About PETC-III

1. To what degree do persons trained in *PETC-III* during the pilot trials perceive the content, materials, activities

[2]The original evaluation design specified looking at the effects of *PETC-III* training during later stages of development. Funding cutbacks curtailed this investigation.

and structure of the instructional system as being of high quality and effective?

2. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being relevant and useful?

3. To what degree do persons trained in *PETC-III* during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

4. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being valuable in relation to costs incurred?

5. To what degree do persons trained in *PETC-III* during the pilot trials perceive the pretraining materials as being adequate and sufficient?

6. To what degree do persons trained in *PETC-III* during the pilot trials report satisfaction with the training?

7. To what degree do persons trained in *PETC-III* during the pilot trials report a need for OD consulting abilities in the educational community and to what extent can *PETC-III* meet this need?

8. What type of people acquire *PETC-III* training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Question Related to Outsider's Perspective of PETC-III

9. From the perspective of impartial outside reviewers, are the goals, content and training strategies for *PETC-III* adequate in terms of their significance, completness, feasibility, social fairness, etc.?

Question Related to Alternatives to PETC-III

10. What are the existing alternatives to *PETC-III* and how does *PETC-III* compare to these alternatives in terms of: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination?

To meet the evaluation needs set out in the above questions, three investigations were carried out: a series of four pilot workshops of the *PETC-III* system, an alternatives search for comparable training programs and an external expert review.

REPORT FORMAT

This report includes five chapters. In the first, the *PETC-III* instructional system is described including its history and objectives. The second chapter describes the pilot test workshop study, including methods of obtaining information, and presents the empirical evidence collected from the workshops. The next chapter describes the process of the external expert review conducted on the *PETC* series and presents a summary of the review critiques. This is followed by a description of the search for alternative training programs on the market and a comparative analysis of the search results. The final chapter contains a summary of the findings. Appendices include the Improving Teaching Competencies Program's product development model, questionnaires used in the pilot test workshops and documents pertaining to the implementation and results of the external review and alternatives search.

DESCRIPTION OF THE *PETC-III* INSTRUCTIONAL SYSTEM

Preparing Educational Training Consultants: Organizational Development (PETC-III) is one in a cumulative sequence of seven instructional systems developed by the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory to provide process and organizational development skills for educational consultants. These seven systems form a comprehensive training program entitled Preparing Organizational Development Specialists (PODS) which consists of a series of three *PETC* training systems: *PETC-I: Skills Training; PETC-II: Consulting;* and *PETC-III: Organizational Development,* as well as four prerequisite training workshops in fundamental process skills including *Interpersonal Communications, Research Utilizing Problem Solving, Interpersonal Influence* and *Social Conflict and Negotiative Problem Solving.*

As the culminating training system in the PODS program, *PETC-III* provides participants with the opportunity to acquire the knowledge, skills and sensitivities that constitute a change process termed Organizational Development (OD). It provides training that enables trainees to help an educational organization (a) achieve structural and normative change, (b) improve its functional capabilities and (c) develop new functions that facilitates change in the kinds of objectives it sets for itself and to utilize new kinds of resources.

OVERVIEW OF ORGANIZATIONAL DEVELOPMENT

Organizational development as conceptualized by the development staff of the Improving Teaching Competencies Program is a strategy to promote organizational change. It is based on some of the theory

emanating from the models of "planned change" (Lippitt, Watson and Westley, 1958; Havelock, 1972) and "action research" (Lewin, 1947; Coch and French, 1948; Jung and Lippitt, 1966). It also incorporates intervention strategies tested by several researchers (Miles et al., 1969; Seashore and Bowers, 1970; Lake and Callahan, 1971; McElvaney and Miles, 1969; Schmuck and Runkel et al., 1972). Organizational development aims to help people in schools increase their competencies so they can more effectively manage the human component of their organizations. The basic strategy of organizational development is to provide training and consultation that involve educators in identifying, diagnosing and modifying the norms, structures and processes of their own organization. Through these normative, procedural and structural changes, it is intended that the organization can build and maintain increased functional capabilities and that its health will be improved.

The rationale for preparing organizational development consultants for school organizations includes three current situations: (a) schools are not as healthy and as effective as they could be (Miles, 1964; Havelock, 1972; Schmuck and Runkel, 1972); (b) few school organizations have the financial resources to hire expensive outside professional organizational consultants over long periods of time; and (c) the number of available outside organizational consultants is inadequate to meet the need.

PETC-III is, therefore, an instructional system and a change support process that can be used by educators at various levels to train organizational consultants who can, in turn, help build and maintain increased functional capabilities in educational organizations.

DESCRIPTION OF MATERIALS AND STRATEGIES

The system in its present form consists of a set of participant materials, a set of instructional strategies to be used with trainees in a workshop setting, some preliminary plans for installing a *PETC-III* training program, strategies to help those trained in *PETC-III* to use their skills in bringing about structural and normative changes in their schools and to provide organizational training and consultation for client groups.

The immediate population for *PETC-III* training consists of educators at any level who wish to acquire the knowledge and skills necessary to provide organizational training and consultation to school groups. Prior to participating as consultants in *PETC-III*, members of this target population will have had to complete the six prerequisites training systems in the PODS training programs. The secondary target population consists of educators who wish to receive organizational development training and consultation from *PETC-III* consultants.

PETC-III training is spread over an 8-month period. During this period, each *PETC-III* trainee completes a 1-day preworkshop assignment, attends 17 days of workshop meetings and spends a minimum of 10 days conducting an organizational development project with a predetermined client group. The following chart outlines the timeline for major training events.

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
Prewrokshop Assignment (Total 1 Day)	4-Day Workshop Meeting	3-Day Workshop Meeting		3-Day Workshop Meeting	3-Day Workshop Meeting		4-Day Workshop Meeting

Note: There are approximately 30 to 35 days between workshop meetings for OD project work with client groups.

The organizational development project focuses on the organization (not individuals, committees or groups of individuals) with a view to building and maintaining improved ways of functioning in the organization. The project is a series of interventions based on data collected and analyzed that focus on structural and normative changes to improve the functioning of the organization. A project may be conducted in one part of the organization or in the organization as a whole.

Present strategies require that two persons with considerable organizational development experience and skills conduct the *PETC-III* workshop. The workshops are structured so that 10 to 18 trainees, divided into 2- or 3-persons teams, go through the training together.

GOALS AND OUTCOME OBJECTIVES

The goals and objectives[3] for *PETC-III* are divided into two categories: (a) consultant outcome goals and objectives and (b) goals and objectives for client groups. The consultant outcomes include participants' satisfaction with the training; their perceptions of its utility; and changes in their behavior, such as an increased knowledge and understanding of organizational development conceptualizations and strategies and an increased ability to exhibit the behaviors required of an organizational consultant. Outcomes expected of client groups include satisfaction with the consultation, perceptions of the consultation as useful and applicable and increased functional organizational capabilities. Specific statements of these objectives follow.

[3]These goals are included for descriptive purposes only. Reductions in funding and development time prevented carrying out an investigation design to assess the effectiveness of the instructional system to achieve these goals.

Consultant Outcome Objectives

The *PETC-III* instructional system prepares participants to become educational training consultants. As a result of training, consultants are expected to be able to:

1. Identify and explain the major organizational development conceptualization and intervention strategies presented in the *PETC-III* instructional system
2. Meet with a potential client group and translate this group's difficulties into a statement of a specific problem or problems on which the group wishes to work
3. Establish definite and workable relationships and contract with a client group
4. Collect information from the client group so that the group's problem(s) may be diagnosed and clarified
5. Design, provide and assess the effectiveness of intervention activities that allow the client group to explore and examine alternative norms, processes and structures
6. Design, provide and assess the effectiveness of intervention activities that allow the client group to accomplish normative, procedural or structural changes resulting in increased functional capability in the organization
7. Achieve a terminal relationship with the client group by gradual withdrawal and by establishing structures and procedures to substitute for the services provided by the consultant

Client Group Outcome Objectives

Since the educational training consultant works with a client group so members can achieve and maintain improved ogranizational health, the consultant expects that the organizational development project will have some effects on the functional organizational capabilities of the client group. Specific examples of such objectives follow:

1. Improved Problem-Solving Capabilities: As a result of training in organizational development, client groups may become more adept at problem-solving. They may become more able to:

   Sense problem situations

Differentiate between kinds of problems

Attend to problem situations with shared and explicit problem-solving procedures

2. Improved Management of Interpersonal Processes: As a result of training in organizational development, client groups may become more adept at combining people's efforts to achieve desired task goals. It is expected that:

   Vertical and horizontal communication may become more open, shared and accurate

   Influence may become more shared and equalized

   Decision making may become more diffused, characterized by explicit procedures and involvement of those who will be affected by or who are responsible for implementation of the decisions

   Coordination may become more explicit and accepted

3. Improved Procedures that Support Personal and Professional Growth: As a result of training in organizational development, client groups may become more adept at viewing personal and professional development as an ongoing function necessary to the growth of the group. Therefore, it is expected that the group may provide:

   Increased training opportunities for members to meet new organizational needs

   Increased learning resources so members can be continuous learners

   Increased feedback, formally and informally, so members can move toward new ways of understanding

4. Improved Ways the Organization Attributes Meaning: As a result of training in organizational development, client groups may become more adept in the ways they see and explain themselves to the rest of the world. It is, therefore, expected that the group will:

   Have goals which are clear and in which members have a sense of ownership

   Respond appropriately to outside demands

PILOT WORKSHOPS

This chapter discusses the pilot test workshops which were conducted as a part of the evaluation of the *PETC-III* training system. The chapter has two principal segments. The first section of this chapter contains a description of these pilot workshops. Topics include: the focus of the evaluation, recruitment procedures, number of participants and their biographical characteristics, and a description of the evaluation instruments used in this investigation. The second major section presents the results of the evaluation activities.

DESCRIPTION OF THE PILOT WORKSHOPS

Focus of the Evaluation

The pilot workshops were designed to: (a) assess the quality, efficacy and relevancy of the instructional system and to measure the degree of trainee satisfaction; and (b) assess the consultants' perceptions of the utility of the training and ways learning can be applied. The pilot workshops provided answers to the following evaluation questions related to trainee judgments about *PETC-III:*

1. To what degree do persons trained in *PETC-III* during the pilot trials perceive the content, materials, activities and structure of the instructional system as being of high quality and effective?

2. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being relevant and useful?

3. To what degree do persons trained in *PETC-III* during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

4. To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being valuable in relation to costs incurred?

5. To what degree do persons trained in *PETC-III* during the pilot trials perceive the pretraining materials as being adequate and sufficient?

6. To what degree do persons trained in *PETC-III* during the pilot trials report satisfaction with the training?

7. To what degree do persons trained in *PETC-III* during the pilot trails report a need for OD consulting abilities in the educational community and to what extent can *PETC-III* meet this need?

8. What type of people acquire *PETC-III* training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Description of Test Sites

Four workshops were conducted as part of this evaluation activity. A total of 50 persons were trained. These pilot-test workshops were held in Portland, Oregon; Minneapolis, Minnesota; and Seattle, Washington. Two separate workshops were conducted in Seattle and later were designated Seattle A and Seattle B.

Twelve consultants attended the workshop in Portland, held at the Northwest Regional Educational Laboratory. The five training meetings were held between April and November 1974. Recruitment of consultants for Portland as well as for the other three test sites was under the direction of the Improving Teaching Competencies Program's Office of Field Relations. Participants at all four test sites met the following criteria: (a) they had completed *PETC-I* and *PETC-II*; (b) as individuals or teams of two or three, they had access to a client group for whom they could provide training and consultation while going through the training; and (c) the district supported their interest in becoming *PETC-III* consultants. Vera Larsen, of the Personnel Development Office in the Portland School District, was responsible for identifying the seven district personnel who went through the training. The two primary

developers of the *PETC-III* training program, Ruth Emory and René Pino, served as trainers for the pilot-test workshops at all four sites.

Meetings for the Minneapolis *PETC-III* workshop were held in the conference facilities of the Sheraton Motor Inn at the Minneapolis/St. Paul Airport, between May and December 1974. The 11 consultants attending the workshop were identified by Jack Tesmer, a NWREL regional representative and a consultant to the Minneapolis School District.

There were 27 participants in the two Seattle workshops, 9 in Seattle A and 18 in Seattle B. Both workshops took place in a prefabricated modular classroom at Rainier Beach High School. The Seattle A workshop met between November 1974 and June 1975; Seattle B between February and July 1975. James Forneris, Director of Conflict Resolution Training Programs for the Seattle Public Schools aided in identifying school district personnel for participation in these two workshops.

Participant Characteristics

A summary of the background characteristics of the participants for each of the four workshops is presented in Table 1. The reader will note that this report does not include a formal analysis of this demographic data and does not use it for any cross-tabular analysis of participant responses to other evaluation instruments. This information is included here purely as descriptive data.

The Portland and the two Seattle workshops were quite similar in three of the five participant characteristics: sex, educational background and years experience in education. The three workshops had a fairly equal mix of men and women; the vast majority of the participants had graduate degrees, primarily master's degrees; and participants had

Table 1

Distribution of *PETC-III* Participant Characteristics by Workshop

Characteristic	Portland		Minneapolis		Seattle A		Seattle B		Total	
	N	%	N	%	N	%	N	%	N	%
Number of Participants	12		11		9		18		50	
Sex										
Male	7	58	10	91	5	56	9	50	31	62
Female	5	42	1	9	4	44	9	50	19	38
Education										
Bachelor's degree	2	17	6	55	1	11	2	11	11	22
Master's degree	9	75	4	36	5	56	15	83	33	66
Doctoral degree	1	8	1	9	3	33	1	6	6	12
Years Work Experience in Education[a]										
0	1	9	0	0	0	0	0	0	1	2
1-3	0	0	2	18	0	0	0	0	2	4
4-6	1	9	3	27	2	25	2	12	8	17
7-10	1	9	1	9	1	12	3	19	6	13
Over 10	8	73	5	46	5	63	11	69	29	64
No response	1	--	0	--	1	--	2	--	4	--
Age[a]										
Under 25	0	0	2	18	0	0	0	0	2	5
25-34	1	12	6	55	4	44	6	38	17	38
35-44	2	25	3	27	3	33	6	38	14	32
45-54	5	63	0	0	2	22	4	25	11	25
Over 55	0	0	0	0	0	0	0	0	0	0
No response	4	--	0	--	0	--	2	--	6	--
Role[a]										
Administrator	4	33	0	0	2	22	5	28	11	23
Supervisor/ coordinator	4	33	1	11	1	11	1	6	7	15
Teacher	0	0	3	33	3	33	1	6	7	15
Staff	0	0	1	11	3	33	11	60	15	30
Consultant	3	25	4	44	0	0	0	0	7	15
Evaluator	1	8	0	0	0	0	0	0	1	2
No response	0	--	2	--	0	--	0	--	2	--

[a]Nonrespondents were not included in the computation of percentages.

considerable experience in education (63 to 73 percent had over 10 years work experience). The Minneapolis workshop was predominantly male with less education (over half the participants had only bachelor's degrees) and less work experience in education (45 percent had six years or less experience).

Participants in the Portland workshop were older than those in the other three workshops: whereas over three-quarters of the participants in each of the Seattle and Minneapolis workshops were between 25 and 44 years of age, the majority (63 percent) of the Portland participants were in the 45 to 54 age bracket.

There were considerable differences in the roles represented in each workshop. The Seattle B workshop was made up entirely of Seattle Public School personnel, predominantly in staff positions, e.g., counselors and psychologists. Two-thirds of the participants in the Seattle A workshop were Seattle Public School personnel in teacher and staff positions; the other trainees were public school administrators and supervisors. The Minneapolis workshop participants were predominantly public school teachers and independent consultants. The Portland workshop consisted primarily of public school administrators, supervisors and central office consultants; there were also three persons from the Improving Teaching Competencies Program's staff and two independent consultants.

Instrumentation

The following evaluation instruments were used to gather information from the pilot-workshop trainees.

Background Questionnaire. This instrument was administered at the beginning of the workshop's first meeting. The instrument was designed to obtain biographical information from the participants such as sex, age, educational background, work role and years of work experience in education. A second version of the Background Questionnaire was developed in the fall of 1974 and requested information about the number and types of consulting experiences of the participants. Copies of both background questionnaires are included in Appendix B.

Final Questionnaire. This questionnaire was administered to all *PETC-III* trainees after training. It collected information regarding their judgments of the content, goals, activities and materials of *PETC-III*. It also assessed trainee satisfaction and trainees' perceptions of the relevance and utility of the training. Appendix C contains a copy of this questionnaire.

Initial Status Report. This instrument was developed during the fall of 1974 to aid evaluators in obtaining information from training teams on the nature of their client systems. The report form asks teams for background data on their client system including information on their organizational relationship to their client (internal/external) and the organizational context of the client group. There are also a series of questions asking for an initial diagnosis of the client system. The Initial Status Report was used in the data collection from the two Seattle *PETC-III* workshops. It was given to trainee teams at the conclusion of the first 4-day meeting. Members were asked to complete it during the interim period between the first and second workshop meetings and return it to NWREL evaluators at the second meeting. A copy of the Initial Status Report is included in Appendix D.

RESULTS OF THE EVALUATION

This section describes the empirical evidence gathered with the Final Questionnaire from trainees at the four pilot workshops. Information also is presented describing the *PETC-III* trainee teams and the client's systems with whom they provided consultation during their practicum experience.

The Final Questionnaire used in the evaluation of the *PETC-III* pilot workshops did not reach completion until mid-summer, 1975. As

a result, the procedure of administering this questionnaire at the conclusion of the workshop's final meeting was not possible except at the Seattle B site. Data were collected from 17 of the 18 participants in this workshop. Participants in the three workshops conducted prior to this date received a copy of the questionnaire in the mail, accompanied by a letter requesting they respond to the questionnaire and asking them to return it to NWREL in an enclosed prepaid, pre-addressed envelope. Responses were received from 9 of the 12 Portland participants, 8 of the 11 Minneapolis participants, and 7 of the 9 participants in the Seattle A workshop. Data presented in this report, therefore, are from a total of 41 respondents, representing 82 percent of the participants who went throught the *PETC-III* pilot training.[4]

Reactions to *PETC-III* Content, Materials, Activities and Structure

Five questions on the Final Questionnaire asked participants to assess the materials for clarity, interest and the demands they presented for original thinking, along with the technical quality of the

[4]The data presented below are only from those questions on the Final Questionnaire that used an anchored rating scale or some other type of closed-ended format; 37 items of the 44-question instrument utilized this format. Immediately following the Final Questionnaire copy included in Appendix C is a listing of the close-ended questions according to what aspect of the evaluation they pertain. Of the 7 open-ended questions, the responses to 5 are also included in Appendix C. No analysis of these responses has been undertaken; they are included in this report solely as descriptive data.

Another of these 7 questions, Question 33, provides information that was to be used by the NWREL evaluators as part of a followup study; the responses from this question are not included here since they contain information that is not a concern of this report. The remaining open-ended question, Question 2, was inadvertently omitted in the final typing of this instrument and the oversight was not caught prior to the administration of the questionnaire to the participants.

content.[5] The results are shown in Table 2. Several questions also ask participants to make judgments regarding the utility of the practice exercise and the overall structure of the training experience. These data are presented in Table 3, page 20. Respondents answered each question on a 5-point or 6-point rating scale, with 1 representing the negative end of the scale and 5 or 6 representing the positive end.[6] Marks on either of the two high points were considered positive responses for both scales and are reported accordingly in the discussion that follows.

Discussion: Materials and Content. Responses were favorable to the two questions on the appropriateness of the workshop content and its clarity of presentation, with positive responses, 91 and 83 percent. The clarity and ease of understanding of the materials themselves

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[5]The Final Questionnaire has several items that the program has used for several years. For the sake of description, the items have been clustered to form the following scales:

Content Quality: 5, 8, 9, 28a, 28c
Activities: 10, 11, 12, 14, 29a, 29b, 29c
Relevance: 3, 4, 13, 28b, 28d, 28e
Utility: 6, 7, 20
Goals and Objectives: 27a, 27b
Costs: 26
Preworkshop: 30a, 30b
Satisfaccion: 1, 17, 22, 16
Need: 15, 34, 35

[6]The majority of the questions used the 6-point rating scale with negative- and positive-value statements marking the poles. An even-numbered scale was used for these questions since it does not provide a midpoint for an "undecided" response, thus encouraging respondents to take a value stance on each item. There were several questions (27-30 and 34) for which the evaluators wished to assign value-positions for each point on the scale. A 5-point breakdown seemed to lend itself best to this format. The 5-point rating scales used for Questions 27-30 had 5 signify the negative pole and 1 serve as the positive extreme. However, in presenting the data from these questions, the number values of the scales have been reversed to provide uniformity in the tables and discussion.

Table 2

Participant Responses Regarding Quality and Efficacy of Materials and Content

Question		Scale Low 1	2	3	4	5	High 6	Total N	Total $\bar{X}$
Question 28A[a]									
Appropriateness for your experience and understanding	f[b]		1	3	14	23		41	4.44[d]
Excellent (High) vs. Unsatisfactory (Low)	C%[c]		*100*	*98*	*91*	*57*			
Question 28C[a]									
Clarity of presentation and definition	f		4	3	18	16		41	4.12[d]
Excellent (High) vs. Unsatisfactory (Low)	C%		*100*	*90*	*83*	*39*			
Question 5[e]									
Clear, concise, understandable (High) vs. Hard to understand, complex, full of "jargon" (Low)	f		1	7	10	16	7	41	4.51
	C%		*100*	*98*	*80*	*56*	*17*		
Question 8[e]									
Material maintained my interest (High) vs. Material failed to interest me (Low)	f		1		5	17	18	41	5.24
	C%		*100*		*98*	*86*	*44*		
Question 9[e]									
Demanded much original thinking (High) vs. Demanded no original thinking (Low)	f		1	2	13	12	13	41	4.83
	C%		*100*	*98*	*93*	*61*	*32*		

[a]Question 28: Please rate the workshop *content:* Skills, concepts, principles and values for:

[b]f = Frequency.

[c]C% = Cumulative Percentage.

[d]Question 28 uses only a 5-point scale.

[e]Questions 5, 8 and 9: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?

Table 3

Participant Responses Regarding Quality and Efficacy of Activities and Structure

Question		Scale Low 1	2	3	4	5	High 6	Total N	Total $\bar{X}$
Question 10[a]									
Practice exercises were of great value (High) vs. Practice exercises were of little or no value (Low)	f[b]		1	1	5	18	16	41	5.15
	C%[c]		*100*	*98*	*96*	*84*	*39*		
Question 29A[d]									
Appropriateness for learning to be a consultant Excellent (High) vs. Unsatisfactory (Low)	f		1	4	14	21		40[e]	4.38[f]
	C%		*100*	*98*	*88*	*53*			
Question 29B[d]									
Practical usefulness in learning consultant skills Excellent (High) vs. Unsatisfactory (Low)	f		3	3	11	24		41	4.37[f]
	C%		*100*	*93*	*86*	*59*			
Question 11[a]									
Session time was well used (High) vs. Time in the sessions was wasted (Low)	f		3	1	5	14	18	41	5.05
	C%		*100*	*93*	*91*	*79*	*45*		
Question 29C[d]									
Efficient use of time Excellent (High) vs. Unsatisfactory (Low)	f	1	3	4	20	13		41	4.00[f]
	C%	*100*	*98*	*91*	*81*	*32*			
Question 14[a]									
Allowed time for reflection about self and personal growth (High) vs. Did not allow time for reflection about self and personal growth (Low)	f	1	1	2	8	14	15	41	4.90
	C%	*100*	*98*	*96*	*91*	*71*	*37*		
Question 12[a]									
Structure useful, promoted learning (High) vs. Too structured, blocked learning (Low)	f		1	2	8	16	14	41	4.95
	C%		*100*	*98*	*93*	*73*	*34*		

[a]Questions 10, 11, 12 and 14: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?

[b]f = Frequency.

[c]C% = Cumulative Percentage.

[d]Question 29: Please rate the workshop *methods/strategies/procedures* for:

[e]One participant did not respond to this question.

[f]Question 29 uses only a 5-point scale.

received an appreciably lower rating, with but 56 percent positive response. For the most part, participants reported that the materials succeeded in maintaining their interest--86 percent responding positively. They did not, however, report as positively about the demand of the materials for original thinking; only 61 percent responded positively to this question.

It would appear that *PETC-III* trainees during the pilot workshop trials considered the materials to be stimulating and appropriate for their level of comprehension. However, the clarity of the materials was not as favorably viewed.

Discussion: Activities and Structure. There were seven questions relating to the activities and structure of the training experience. One question asked the participants to rate the value of the practice exercises, to which 84 percent responded positively. There was an equally favorable response to the two questions directed at the appropriateness and practical usefulness of the *PETC-III* training strategies for learning consulting skills, with a positive response of 88 and 86 percent, respectively. Finally, four questions related to the usefulness of the structure and various aspects of the way session time was used and its effectiveness. The same use of time at the *PETC-III* meetings was also viewed in a favorable light, with positive responses of 79 and 81 percent to the two questions on this topic. Response to the more specific question of whether sufficient time was allowed for reflection on self and personal growth was slightly less favorable with only 71 percent positive response. The usefulness of the structure received a similar positive rating of 73 percent.

These data seem to reveal a quite favorable response by participants regarding the value and usefulness of the activities and structure of the *PETC-III* training program.

Perceptions of Relevance and Utility of *PETC-III*

Participants were asked several questions about the relevance of the *PETC-III* training and the usefulness of the system's content.

Discussion: Relevance. Table 4 presents the results of the questions on the relevance of the system's content. To the question on the importance of the issues dealt with in *PETC-III*, there was a positive response of 85 percent. Another question asked participants to judge the workshop's content for parsimony and how well it minimized on extraneous material, to which 79 percent responded positively. Two other questions asked participants to rate the materials and methods on their ability to provide new insights in general, and into the trainees' own personal style. These produced positive responses of 83 and 81 percent. The two questions which asked specifically for the participants' perceptions of the relevance and practical significance of the workshop content for learning consulting skills received the most favorable response. There was a positive response of 88 percent on practical significance and 95 percent on relevance.

One question reflected on the relevance of the prerequisite workshops for *PETC-III* by asking participants if they believed the time commitments and prerequisites to be excessive. These data are presented in Table 5, page 24, indicating that 78 percent considered the prerequisites to be demaning but necessary.

Table 4

Participant Responses Regarding Perceived *Relevance* of System's Content

Question		Scale Low 1	2	3	4	5	High 6	Total N	Total $\bar{X}$
Question 4[a]									
Spoke to important issues, vital concerns (High) vs. Missed the important issues, vital concerns (Low)	f[b]				6	13	22	41	5.39
	C%[c]				*100*	*85*	*53*		
Question 28D[d]									
Parsimony (little or no unimportant or unuseful material) Excellent (High) vs. Unsatisfactory (Low)	f		3	5	16	14		38[e]	4.08[f]
	C%		*100*	*92*	*79*	*37*			
Question 3[a]									
Offered new insights, new ways of viewing old problems (High) vs. Only restated or provided what I already knew (Low)	f			1	6	14	20	41	5.29
	C%			*100*	*98*	*83*	*49*		
Question 13[a]									
Gained new insights about my style of consulting (High) vs. Learned nothing new about my style of consulting (Low)	f				8	10	29	41	5.29
	C%				*100*	*81*	*49*		
Question 28E[d]									
Practical significance for successful consulting Excellent (High) vs. Unsatisfactory (Low)	f		2	3	14	22		41	4.37[f]
	C%		*100*	*95*	*88*	*54*			
Question 28B[d]									
Relevance for learning to be a consultant Excellent (High) vs. Unsatisfactory (Low)	f			2	13	20		41	4.66[f]
	C%			*100*	*95*	*71*			

[a]Questions 3, 4 and 13: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?

[b]f = Frequency.

[c]C% = Cumulative Percentage.

[d]Question 28: 'Please rate the workshop *content:* Skills, concepts, principles and values for:

[e]Three participants did not respond to this question.

[f]Question 28 uses only a 5-point scale.

Table 5

Participant Responses Regarding Need for Prerequisites to *PETC-III*

Question	N[a]	Percent
Question 32[b]		
Yes, definitely; could be reduced somewhat	6	15
No, they are demanding but necessary	31	78
No strong opinion either way	3	7

[a]One participant did not respond to this question.
[b]Question 32: Do you think time commitments and prerequisites for *PETC-III* are excessive?

Discussion: Utility. Three questions were asked concerning the utility of learnings in *PETC-III* and the responses are presented in Table 6. There was a moderately favorable response to the two questions asking if the training provided real "how to" help (68 percent positive response) and immediately usable learnings (78 percent positive response). To the question asking the participants how much they intended to use the workshop materials and learnings, there was a higher positive response of 81 percent.

It would appear, in general, that *PETC-III* is seen by workshop participants as relevant and useful to their educational concerns.

Assessment of Goals and Objectives, Costs, and Pretraining Materials

Participants at the pilot workshops were asked to respond to several questions relating to the goals and objectives of the training program, costs incurred, cost-benefit potential and the effectiveness of the pretraining materials.

Table 6

Participant Responses Regarding Perceived *Utility* of System's Content

Question		Scale Low 1	2	3	4	5	High 6	Total N	Total $\bar{X}$
Question 7[a]									
Provided real "how to" help for my actual group work (High) vs. Little "how to" help for my actual group work (Low)	f[b]		2	1	10	14	14	41	4.90
	C%[c]		*100*	*95*	*93*	*68*	*34*		
Question 6[a]									
Ideas, skills, methods can be used immediately under existing conditions (High) vs. Usage would require changes in conditions that I have no control over (Low)	f		3	2	4	17	15	41	4.95
	C%		*100*	*93*	*88*	*78*	*37*		
Question 20[d]									
Extensively (High) vs. Not at all (Low)	f		1	2	5	8	25	41	5.32
	C%		*100*	*98*	*93*	*81*	*61*		

[a]Questions 6 and 7: Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them?
[b]f = Frequency.
[c]*C%* = Cumulative Percentage.
[d]Question 20: In all honesty, how much do you plan to use the ideas, skills and/or materials presented in this workshop as an integral part of your work?

Discussion: Goals and Objectives. Two questions asked participants to rate the goals and objectives of the *PETC-III* training program for their clarity and significance. These questions used a 5-point rating scale, with responses at points 4 and 5 indicating a positive opinion. Results are shown in Table 7. Of the participants, 88 percent responded positively to the question on clarity; 95 percent believed the goals and objectives to be significant and important. These data show that, for the most part, the workshop participants considered the goals and objectives of *PETC-III* to be clearly stated and of importance to the educational community.

Table 7

Participant Responses Regarding the Goals and Objectives

Question		Scale Low 1	2	3	4	High 5	Total N	$\bar{X}$
Question 27A[a]								
Clarity								
Excellent (High)	f[b]			5	23	13	41	4.20
vs.	C%[c]			*100*	*88*	*32*		
Unsatisfactory (Low)								
Question 27B[a]								
Significance/Importance	f			2	18	21	41	4.46
Excellent (High)	C%			*100*	*95*	*51*		
vs.								
Unsatisfactory (Low)								

[a]Question 27: Please rate the *goals and objectives* for:
[b]f = Frequency.
[c]C% = Cumulative Percentage.

Discussion: Costs. To assess the feasibility and reasonableness of the costs of participating in the *PETC-III* training program, NWREL evaluators asked participants on the Final Questionnaire to note the expenses they incurred out of their own pockets and the potential income they lost in attending the meetings. Participants were then asked to consider these costs as well as the time and energy spent, and to indicate what they thought of the workshop expenses in light of what they got out of the training. Data are presented in Tables 8 and 9.

There are two general limitations to the presentation of this out-of-pocket expense data as accurate indicators of the cost of participation in a *PETC-III* workshop. Since these workshops were part of the developmental process of *PETC-III* and thus funded by the NWREL's contract with the National Institute of Education, the training was provided at no cost to the participants; out-of-pocket costs were only for incidental expenses. Too, participation in *PETC-III* requires

Table 8

Participant Expenses

Question	Response N	Response Percent	Respondents Stating Special Amount N	Respondents Stating Special Amount Percent	Range of Expenses	Mean Expense[a]
Question 24[b]						
Travel Costs	25	61	22	54	$10-2000	$218.86
Room and Board	11	27	9	22	$10-560	$188.11
Tuition	12	29	12	29	$180	$180.00
Other	17	41	14	34	$5-1000	$94.79
Question 25[c]	8	20	8	20	$170-4000	$1046.25

[a]Mean expense was tabulated by totaling the amount of expenses in a given category and dividing by that number of participants who stated a specified amount of expense.
[b]Question 24: Which of the following costs did you incur out of your pocket in order to attend this workshop? Please estimate the amount.
[c]Question 25: Did you give up potential income in order to attend (e.g., other jobs)? If yes, please give an estimate of how much.

Table 9

Participant Assessment of Value for Costs Incurred

Question	N[a]	Percent
Question 26[b]		
Costs were too great, etc.	2	5
Costs were about right, etc.	5	13
Costs were small, etc.	32	82

[a]Two participants did not respond to this question.
[b]Question 26: Considering the costs (e.g., monetary, time, etc.) that you incurred in order to attend this workshop, how do you feel?

completion of six prerequisite workshops with the attendant costs of these activities. The other factor that limits the generalizability of this data is that the respondents constituted less than 35 percent of the total number of participants in three of the four categories of expenses. A nonresponse may mean that the participant had no expenses in that category, that the expenses incurred were negligible and not worth mentioning, or that there were continual expenses that would require too much effort to figure out. Given the minimal response to this question, the data should not be considered as representative. This last disclaimer applies also to the data from the question on income lost due to workshop participation to which only eight participants responded. The data from these two questions are presented here simply as descriptive information about this particular population.

To the question on expenses incurred out of their own pockets, 25 participants responded that they had had travel expenses; 22 participants (54 percent) provided information on the amount of their travel expenses. Travel expenses ranged from $10 to $2,000, with a mean travel expense of $218.86 for these 22 respondents. Three of these participants lived in a state other than that of their workshop site and thus incurred large air travel expenses. Travel expenses for the other 19 participants, who lived in the area of the workshop site, ranged from $10 to $100, with a mean expense of $43.15 (these data are not included in Table 8).

Eleven participants indicated having had expenses in the "room and board" category. Of these, 9 respondents (22 percent) listed specific costs, which ranged from $10 to $560; the mean expense for these 9 respondents was $188.11. In addition to the general disclaimers mentioned earlier, there is another reason for this figure to not be considered an accurate indicator of the room and board expenses a

prospective participant can expect to incur: it has mixed data both from out-of-town participants who had hotel expenses, and from local participants with the lesser meals representing the only expense data.

Some people elected to receive graduate credit from United States International University in San Diego, California, for their participation in this training. Therefore, 12 persons (29 percent) opted to pay the $180 tuition fee.

To the "other expenses" category, there were 17 responses, with 14 of the participants (34 percent) giving specific amounts of expenses incurred. These expenses ranged from $5 to $1,000, with a mean expense of $94.79. The person who had $1,000 of expenses in this category was a Seattle workshop participant from California who included some of his travel expenses in this category. The expenses for the other 13 participants ranged from $5 to $50, with a mean expense of $25.15 (these data are not shown in Table 8). The most common expenses in the "other" category were for books and food.

Eighty percent of the participants indicated that they had not lost any personal income due to their attending the *PETC-III* workshop. The information provided by the 8 particpants (20 percent) who did lose income shows a range of income lost from $170 to $4,000, with a mean loss of $1,046.25.

Ninety-five percent of the participants thought the costs were small or about right compared to what they had received from the training. In looking at the individual data (not shown in Table 9) it was determined that the 5 percent who responded that the costs were too great represented two persons from the midwestern United States who attended the five meetings at one of the Seattle, Washington, workshops and who had sustained extreme travel expenses.

Discussion: Pretraining Materials. Prior to the first 4-day meeting, workshop participants received descriptive materials related to the objectives, content and process of the *PETC-III* training program and instructions for carrying out some preliminary consulting activities involving entry into the client system. The two Seattle workshops were also issued a *PETC-III* central ideas book with a designated reading assignment. Two questions on the Final Questionnaire inquired about how well these materials and activities provided the participants with information and accurate expectations about the nature of the workshop. The information is summarized in Table 10.

Table 10

Participant Responses Regarding
Preworkshop Orientation Materials and Activities

Question		Scale Low 1	2	3	4	High 5	Total N	$\bar{X}$
Question 30A[a]								
How successfully they provided you with information you needed	f[b]	1	5	9	12	13	40	3.78
Excellent (High) vs. Unsatisfactory (Low)	C%[c]	*100*	*98*	*86*	*63*	*33*		
Question 30B[a]								
How successfully they gave you clear and correct expectations about the nature of the workshop	f		6	9	12	14	41	3.83
Excellent (High) vs. Unsatisfactory (Low)	C%		*100*	*86*	*63*	*34*		

[a]Question 30: Please rate the preworkshop orientation materials and activities for:
[b]f = Frequency.
[c]C% = Cumulative Percentage.

The data from these two questions suggest that the pretraining materials did not completely meet the informational needs of the participants. Both questions received only a 63 percent positive response.

An examination of the data by workshop (not shown in Table 10) reveals that participants in the two Seattle workshops responded more favorably than the overall mean on both items, particularly to the question on provision of sufficient information. This may be due to their having access to the central ideas book as a part of their pretraining materials.

Satisfaction with Overall Training

Two questions on the Final Questionnaire touched on the participant's judgments about the worth of their consulting experience and of the training experience as a whole. A third question asked them to compare the *PETC-III* workshop with other professional educational courses. A final question asked how well the workshop had met their expectations. The results are presented in Table 11.

Discussion. There was a high favorable response to all four questions, particularly the one concerning the value of the overall training experience to which 93 percent responded positively, and the one comparing *PETC-III* to previous professional educational courses which received a 94 percent favorable comparison. Of the participants responding, 83 percent reported highly about their consulting experience and 81 percent reported that the workshop exceeded their expectations.

It would seem from these data that participants in the pilot trials thought *PETC-III* more than fulfilled their expectations and provided them with a valuable consulting practicum and a worthwhile training experience and these compared favorably with prior educational experiences.

Perceptions of the Need for OD Consulting Abilities and the Ability of *PETC-III* to Fulfill This Need

In order to gain information on the needs in the educational community for internal organizational development capabilities, one

Table 11

Participant Responses Regarding
Satisfaction with Overall Training

Question		Scale Low 1	2	3	4	5	High 6	Total N	$\bar{X}$
Question 22[a]									
Extremely worthwhile (High)	f[b]			1	2	9	29	41	5.61
vs.	C%[c]			*100*	*98*	*93*	*71*		
Not very worthwhile (Low)									
Question 16[d]									
Very high (High)	f		1	1	1	6	32	41	5.63
vs.	C%		*100*	*98*	*96*	*94*	*79*		
Very low (Low)									
Question 17[e]									
Extremely valuable, worthwhile experience. Much learning accomplished (High)	f			3	4	13	21	41	5.27
vs.	C%			*100*	*93*	*83*	*51*		
Little value, no learning accomplished (Low)									
Question 1[f]									
Has exceeded my expectations (High)	f		1	2	5	22	11	41	4.98
vs.	C%		*100*	*98*	*93*	*81*	*27*		
Has not come up to my expectations (Low)									

[a]Question 22: Now that the workshop/course is over, how would you sum up the experience?
[b]f = Frequency.
[c]C% = Cumulative Percentage.
[d]Question 16: How would you rate this workshop compared to other professional education courses you have taken?
[e]Question 17: In an overall assessment of your consulting experience, was it:
[f]Question 1: To what extent has this workshop fulfilled your expectations about what you personally might get out of it?

question on the Final Questionnaire probed the participants' perceptions of such a need. Two further questions asked the participants how well they thought the *PETC-III* training would meet this need. The results are found in Table 12.

Discussion. The question on the need for educators with OD consulting abilities provided the respondents with four choices ranging from "definitely no need" to "definitely strong need." There was complete unanimity among the respondents on this question, with 100 percent

Table 12

Participant Responses Regarding the Need for OD Consulting Abilities and the Ability of the *PETC-III* Training Program to Meet This Need

Question		Scale Low 1	2	3	4	5	High 6	Total N	Total $\bar{X}$
Question 34[a]									
Definitely strong need (High)	f[b]					41		41	5.00[d]
vs.	C%[c]					*100*			
No opinion (Low)									
Question 35[e]									
Excellent (High)	f		1	3	8	29		41	4.59[d]
vs.	C%		*100*	*98*	*91*	*71*			
None (Low)									
Question 15[f]									
High Potential (High)	f			1	4	14	22	41	5.39
vs.	C%			*100*	*98*	*88*	*54*		
Low Potential (Low)									

[a]Question 34: Do you believe there is a need in the educational community for educators with organizational development consulting abilities?
[b]f = Frequency.
[c]C% = Cumulative Percentage.
[d]Questions 34 and 35 use only a 5-point scale.
[e]Question 35: Please rate the potential of *PETC-III* for meeting such a need.
[f]Question 15: How would you rate it in terms of its potential for organizational improvement?

indicating a definite strong need. The questions regarding the ability of *PETC-III* to meet such a need also received a high favorable response with 91 and 88 percent of the participants reporting positively.

Based on these data, participants overwhelmingly perceived a strong need in the educational community for internal organizational development capabilities. In addition, participants believe strongly in *PETC-III*'s ability to meet this need.

Background on Consultant Teams and Their Client Systems

Through the use of the Initial Status Report, descriptive information was collected from the *PETC-III* trainees on the composition of the trainee teams and their client systems, which part of an organization

their client system represented and the relationship of members of the trainee team to their client system. This information is presented, by workshop, in Tables 13, 14, 15 and 16, pages 35-38. Table 17, page 39, provides a summary of this information.

Discussion. As described previously, a total of 50 trainees completed the *PETC-III* training program. They provided consultation to 26 client systems. The *PETC-III* strategies suggest that consulting teams consist of two persons, and sixteen of the consulting groups (nearly two-thirds of the total) were 2-person teams. The other trainees were either in 3-person teams or acted as individual consultants.

Since the purpose of the *PETC-III* training program is to provide internal organizational development capabilities in the educational community, it was considered preferable that the consulting practicums reflect this orientation. In over three-quarters of the consultant-client relationships, one or more of the members of the consulting team was also a member of the client system's organization. A like percentage of the client systems were part of the educational community. They were predominantly public school staffs and administrators and central office personnel, but also included such groups as an alternative school system, an advisory body in a university library system and university students in an independent doctoral program. Five client systems were social organizations, such as a gay rights committee in Minneapolis and an educational research and development laboratory. The remaining client system was from business. In 12 of the 26 client systems, the specific organizational subgroup the consultants worked with represented administration. A nonadministrative subgroup was represented in eight of the client systems, while six of the client groups consisted of an entire organization.

Table 13

Summary Information of *PETC-III* Consultant Teams and Their Client Systems

Portland, Oregon
April - November 1974

Consultant Teams				Client System	
Team/Individual	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	M	Evaluator	Internal	Educational research and development laboratory	One semiautonomous work unit
	F	Associate Coordinator Field Relations	Internal		
	M	Director Field Relations	Internal		
Team	F	Administrator	Internal	High school	Primarily the principal and vice principal
	F	Consultant	External		
Individual Consultant	M	Consultant	Internal	Middle school	One project with departmental instructional team; one project with entire staff
Team	M	Administrator	Internal	Church	Coordinator of social service programs
	M	Consultant	External		
Team	M	Coordinator	External	K-8 school	Faculty of upper grades
	F	Administrator	External		
Team	M	Administrator	Internal	A public school district's area central office	Administrative staff
	F	Supervisor	Internal		

Table 14

Summary Information of *PETC-III* Consultant Teams and Their Client Systems

Minneapolis, Minnesota
May - December 1974

Consultant Teams				Client System	
Team/Individual	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	M	Social Work-Consultant	External	Nursing home	Administrator of home and director of nursing
	M	Engineering Technician	External		
Team	M	Administrator	External	State Department of Education	Administrator of personnel and staff development
	M	N/A	External		
Individual Consultant	M	Consultant-Private	Internal	Small private consulting firm	Entire staff
Team	M	Facilitator-Small Groups Religion	External	High school	Administrative committee
	M	School Social Worker	Internal		
Team	M	Furniture Manufacturer	External	A minority rights committee	Executive director and board of directors
	F	Consultant-Media Specialist	External		
	M	Free-Lance Consultant	External		
Individual Consultant	M	Teacher	Internal	Alternative school system	Entire school

Table 15

Summary Information of *PETC-III* Consultant Teams and Their Client Systems

Seattle, Washington (A)
November 1974 - June 1975

Consultant Team				Client System	
Team/Individual	Sex	Position	Relationship to Client System	Client System	Organizational Context
Individual Consultant	M	Teacher	Internal	College	College president, vice president for academic affairs, and two committees of the college's General Education Program
Team	F M	Psychologist Administrator	Internal Internal	Public school district	Personnel of the instructional services division
Individual Consultant	M	Teacher	Internal	Commercial business	Coordinator of sales training program for Ross Lab
Team	F M	Administrator Director of Organizational Development for State Department of Education	Internal External	Public school district	Twelve-person administrative team for district, including superintendent
Team	F F	Teacher/Counselor School Psychologist	External External	Public school community action group	Community action group of nine school principals and nine Parent-Teacher-Student Association presidents in a subdistrict of Seattle Public Schools
Individual Consultant	M	School Psychologist	Internal	A "university-without-walls" type doctoral program	The students involved in program

Table 16

Summary Information of *PETC-III* Consultant Teams and Their Client Systems

Seattle, Washington (B)
February - July 1975

Consultant Teams				Client System	
Team/Individual	Sex	Position	Relationship to Client System	Client System	Organizational Context
Team	F	School Psychologist	External	School counselor, project director	High school staff person
	F	Psychologist	External		
	F	Counselor (Adult)	External		
Team	M	School Psychologist	Internal	District student relations department	Subdepartment of district's Department of Curriculum and Special Services
	M	Psychologist/Consultant	Internal		
	F	School Psychologist	Internal		
Team	F	Counselor	Internal	High school	Decision-making organization of high school
	F	Administrator	Internal		
Team	M	Administrator	Internal	High school instructional council	Council serves in advisory position to principal
	F	Counselor	Internal		
Team	F	Counselor	External	University library system	Advisory and coordinating body for undergraduate and health sciences libraries
	F	Librarian	Internal		
Team	M	Activity Coordinator	Internal	Regional administration	Subdistrict administration
	M	Program Coordinator	Internal		
Team	M	Department Chairman	Internal	Human relations committee	Subgroup of the public schools human relations task force
	M	Counselor	Internal		
Team	M	Assistant Superintendent	Internal	Public school district	Working with the management function of their own roles as superintendent and assistant superintendent
	M	Superintendent	Internal		

Table 17

Summary Data of *PETC-III* Consultant Teams and Their Client System

Characteristics	Portland		Minneapolis		Seattle A		Seattle B		Total	
	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent
Number of participants	12	24	11	22	9	18	18	36	50	100
Number of teams	6	23	6	23	6	23	8	31	26	100
Number of consultants on teams:										
Individual	1	17	2	33	3	50	0	0	6	23
Two-person teams	4	66	3	50	3	50	6	75	16	62
Three-person teams	1	17	1	17	0	0	2	25	4	15
Relationship of consultant to client system:										
Internal	3	50	2	33	4	66	6	75	15	58
External	1	17	3	50	1	17	1	12	6	23
Internal/external combination	2	33	1	17	1	17	1	12	5	19
Client types:										
Educational	4	67	3	50	5	83	8	100	20	77
Business	0	0	0	0	1	17	0	0	1	4
Social organizations	2	33	3	50	0	0	0	0	5	19
Organizational context:										
Administration	3	50	4	67	2	33	3	38	12	46
Organizational subgroup	1	17	0	0	2	33	5	62	8	31
Whole organization	2	33	2	33	2	33	0	0	6	23

EXTERNAL REVIEW

Contained in this chapter is a description of the external expert review. The focus of the evaluation in this investigation is presented, as is a description of the selection process of members of the Review Board. Then follows a summary of the reviewers' written critiques.

FOCUS OF THE EVALUATION

This particular evaluation activity[7] was designed to obtain information from impartial outside reviewers to answer the following evaluation question:

> From the perspective of impartial outside reviewers, are the goals, content and training strategies for *PETC-III* adequate in terms of their significance, completeness, feasibility, social fairness, etc.?

THE SELECTION OF REVIEWERS

The reviewers of *PETC* were chosen by the nominations of their peers to be persons experienced and competent in school intervention and consultation. The four reviewers selected were Gene Mulcahy, Trustee of the Knox Foundation and former Director of Shanti School, Hartford, Connecticut; Ann Burr, elementary school teacher and member of the Cadre of Organizational Communication Consultants, Eugene Public Schools, Eugene, Oregon; Bunyan Bryant, Assistant Professor, School of Natural Resources, University of Michigan and former member of the Educational Change Team, Ann Arbor, Michigan; and Bonard Wilson, consultant with the Leadership Institute of Spokane and former UNESCO Consultant to the Ministry of Education, Indonesia, Rhodesia, Panama and the Philippines.

[7]The external review for *PETC-III* was conducted in conjunction with reviews for *PETC-I* and *PETC-II*. In addition to being more cost effective, the combined review allowed for judgment about the sequential and cumulative aspects of the *PETC* series.

The Review Board was chosen through the nominations of 22 people involved in educational change. To maximize the different possible networks of individuals involved in school intervention, a stratified sample of nominators was selected from the following sources: (a) individuals having had organizational development experience as listed in *Organization Development in Schools* (Schmuck and Miles, 1970); (b) individuals listed in the directory of the International Association of Applied Social Scientists; and (c) authors listed in the *Bibliography on Organizational Change in Schools* (Runkel, 1974). The individuals compiled from these lists were placed on a matrix of four regions in the United States and a matrix of four institutional affiliations (university, research organization, educational affiliation or private consultant). An individual was randomly chosen from each cell and contacted by mail explaining the purpose of the Review Board. They were then contacted by telephone to nominate in ranking order other individuals to serve on the Review Board. Five points were assigned their first choice, four points their second choice, and so on. The object was to select those individuals with the highest scores to be on the *PETC* Review Board.

There were 98 different nominations by the 22 nominators. Only three individuals received recommendations from two or more people; those were Matthew Miles, Richard Schmuck and Mark Chesler. Miles and Schmuck had been eliminated earlier as potential reviewers because of earlier or current associations with the *PETC* Program and Chesler was one of the nominators. Twenty-six individuals were the first choice of nominators (some nominators had more than one first choice). Since the objective of selecting individuals who had been repeatedly nominated

by their peers was not met, the Review Board was chosen from these 26 names to include individuals who met the following criteria:

1. An individual with a training and development focus who had worked with instructional systems in education. Bonard Wilson met this criterion.

2. An individual with an educational focus who had also worked in training and school consultation. Ann Burr and Gene Mulcahy met this criterion; the former working within the public sector, the latter working in the private sector of alternative schools.

3. An individual with a broad systems change perspective who had worked in schools. Bunyan Bryant met this criterion.

4. In addition, there was a concerted effort to have the Review Board composed of individuals of differing ages, ethnicity and sexes.

THE FINDINGS OF THE REVIEWERS

A 4-member Review Board met October 20-23, 1975, at the Northwest Regional Educational Laboratory in Portland. Participating on the Review Board were Bunyan Bryant, Ann Burr, Gene Mulcahy and Bonard Wilson, whose backgrounds have been discussed previously. The purpose of this 4-day conference was to facilitate the reviewers' preparation of their written summative reports. They were provided information about the training materials and were given an opportunity to seek clarification on issues they identified. During the conference, presentations were made by developers and evaluators of the Improving Teaching Competencies Program. Several graduates of *PETC* took part in an information-sharing session. Work sessions also were provided to enable the reviewers to confer with each other and to compose their individual written critiques. The agenda and a more detailed description of the activities during the four days are presented in Appendix E.

Reviewers were provided with a series of questions, included in Appendix E, to serve as a guideline for their written critiques. The questions concerned the merit and appropriateness of the rationale and goals, content and training procedures of the *PETC* series, and dealt with issues of the role of the trainer and the identification of target populations. The following section consists of a summary of the four written reviews. The complete text can be found in Appendix E.

The Rationale and Goals of the *PETC* Series

Clarity. Three of the reviewers considered the rationale and goals for the *PETC* series to be "very clearly presented...and well defined." Wilson, however, believed that the goals of the program lack specificity due to being couched in instructional terms rather than behavioral terms.

Logic. All reviewers agreed that the conceptual logic of the program was sound and consistent. There was a belief among the reviewers, most succinctly expressed by Wilson, that perhaps the *PETC* series was too logically ordered, to the point where it might not be flexible enough to be adapted to a variety of learner needs and situations.

Social Significance. The goals of providing educators with skills for understanding and working with interpersonal relationships, group process and organizational systems for the purpose of effecting humanitarian change in the educational community were seen by all the reviewers as having a great deal of social significance.

There were, however, several concerns raised by each of the reviewers regarding issues of social justice that are inherent in the purpose and implementation of the *PETC* training programs. There were four principle concerns: the implicit parameters of the target populations, the neutral value stance of *PETC*, sexist and racist implications

in the materials and potential misuse of learnings by *PETC* graduates. These concerns will be more fully discussed later in this section.

Claims and Disclaimers. Without exception, the reviewers thought the claims and disclaimers made for the *PETC* training program were clearly and explicitly stated. Mulcahy further commented that he considered the claims to be understated, that "the potential and actual, in the package, transcends the claims made for it." Wilson indicated that some disclaimers had been given only verbally and needed to be included in the written materials.

Target Populations

The reviewers agreed that the *PETC* target populations were clearly identified. They all took issue, however, with the parameters set on these target populations. Criteria for particiation--being in a manager role, having sufficient time and financial resources--promote a highly exclusive selection process that results in a tendency toward white, male, middle-class leaders. "There is no consideration in the program for the fact that the appropriate organizational development consultant in a situation may be a student, or a black parent, or a member of the community not skilled in the jargon and concepts of the educationist." The reviewers expressed a desire to see that access to the training be provided for students, community members and all levels of school personnel.

The Content of the *PETC* Series

According to Bryant, "...it is probably one of the best conceptual and integrative organizational change and development pieces to date... the *PETC* system was clearly integrated into a meaningful whole, integrating skills and theoretical concepts, and activities that went from

simple to more complex." [illegible] stated similar opinions of the conceptual content of *PETC*. However, some shortcomings were noted, including the following.

Content Insufficiencies. There were recommendations from individual reviewers suggesting the addition of materials on alternative approaches to consulting, the process of moving from diagnosis to intervention and methods for working with oppressed groups. Burr and Wilson mentioned the absence of content in the affective areas, particularly in the context of working with a client. Said Wilson, "A consultant could graduate from this program and be unable to help clients deal with values and feelings."

Social Justice Concerns. Two concerns were voiced by the reviewers in regard to the presentation of the content and the neutral value stance assumed by the materials. The former concern related to sexist and racist implications. The use of sexist language (the teacher, she; the principal, he) was pointed out by all the reviewers. In addition, the settings of exercises were pointed out to reflect a white and middle-class orientation to the world.

The second concern involved the lack of any explicit value positions presented in the materials in regard to social justice issues in the ecucational community. Mulcahy remarked, "consideration of [the] social, ethical questions of reform and revolution is not forthcoming either in the rationale or the design of the program." Given the social inequities present in today's educational community and the perceived bias in the selection of *PETC* trainees, Bryant and Mulcahy commented on the possibility of *PETC* training being used to buttress existing conditions rather than to change them.

Time and Money. Although all reviewers agreed cost is a major issue for all substantive organizational change strategies, it also was introduced as a limitation of *PETC*.

Inflexibility of System. While on the one hand reviewers were impressed with the system's conceptual integration and integrity, they expressed a concern that the structure might impede trainee learning. This question arose as a result of input from the *PETC* graduates who acknowledged during the course of training they often were unsure why certain concepts or exercises were introduced. The gestalt was difficult to see until one had completed the entire package.

Overload of Materials. This was pointed out especially in regard to *PETC-III*. The developers, however, had made changes in the timing of content materials (mailed before and in between training sessions). The training does maximize time, however, and there is a great deal of cognitive input during a short time period.

The Training Procedures of *PETC* and Role of the Trainer

Training Procedures. By and large, the reviewers considered the training procedures to be appropriate. Wilson qualified his support by again mentioning the training program's lack of attention to affective learnings, for which he felt the training procedures very inadequate.

Role of the Trainer. The clarity and explicitness in the definition of the trainer's role was viewed quite highly. It also was felt that building the *PETC-III* trainer role of information-disseminator, a behavior not included in the trainer roles for the other *PETC* training programs, was appropriate in light of the extraordinary amount of conceptual and theoretical material to be absorbed by the trainees. Wilson

had a reservation about this extramanagerial role with regards to the possible effects of trainer input "in the case of a trainer whose values are not in line with the values underlying the program."

ALTERNATIVES SEARCH

The subject of this chapter is the investigation carried out to identify training programs which offered an alternative experience to *PETC-III*. The focus of this evaluation activity is presented at the outset, followed by a description of the methods used in conducting the search. The chapter concludes with a comparative analysis of *PETC-III* with the identified alternatives.

EVALUATION FOCUS AND METHODS OF THE SEARCH

The alternatives search was an activity designed to answer the following evaluation question:

> What are the existing alternatives to *PETC-III* and how does *PETC-III* compare to these alternatives in terms of: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination?[8]

Initial activities of the search involved conducting an ERIC search; interviewing professionals in the field of organizational development, process consultation and group training; and consulting professional educational and organizational development journals and catalogues. By these means, a list of some 110 persons and/or institutions were identified who were doing work in areas similar to those in the *PETC* series.

A letter and questionnaire were sent to these people and organizations requesting their answers to a series of questions and soliciting related written materials produced by them. Copies of the letter and questionnaire can be found in Appendix F. Responses were received from slightly over 30 percent of those surveyed. Of these responses, 12

[8]The alternatives search for *PETC-III* was conducted in conjunction with searches for *PETC-I* and *PETC-II*. This strategy was employed for reasons of cost-effectiveness.

training programs could be identified that appeared to be in some way comparable to one or more of the *PETC* programs. Telephone interviews were conducted with these respondents in cases where further descriptive information was needed.

LIMITATIONS ON ALTERNATIVES SEARCH

Due to the nature of the *PETC* training programs and to a shifting of focus caused by funding difficulties, there were a number of limitations to the search for and reporting of alternatives. The limitations fall into two areas:

Limitations on the scope of the search itself

Limitations on the comparative analysis of the training systems identified

Limitations in Scope

Since the *PETC* training programs are a process-oriented approach to consulting and organizational development, the search for alternatives was limited to identifying training opportunities with similar process orientations.

Requests for information were sent to 110 people and/or institutions; responses were received from only 35 people. This by no means represents an exhaustive study. That the search ended with this first stage of exploration was in great part due to a shifting of priorities to other activities when the program's impending loss of funding became known. Further strategies for the identification process were planned but not carried out. These included sending followup letters to nonrespondents from the group of 110 and a second stage of followup contacts by telephone. Also, further investigations in the literature and continued interviews with professionals in the field of process consultation and organizational

development were planned; the identification of the 110 people was the result of only a preliminary search.

Limitations in the Comparative Analysis

There are three principle issues:

1. Disparity of Formats. It is exceedingly difficult to make a cogent comparison of *PETC-III* with a university doctoral program or with a 3-day film-cassette and discussion workshop, even when they all deal with OD theory and have other subjects in common. Valid comparisons can be made of target populations, topics covered and such tangibles as these, but not of the more abstract characteristics such as cognitive and process outcomes and costs which reflect varying travel expenses, and so on.

2. Superficiality of the Data. One can assume that a 3-day workshop on OD theory is going to offer less than a 4-year graduate program with an emphasis on OD theory. It is much more difficult to note the differences between two workshops of similar duration that claim to cover the same issues and produce similar outcomes unless there is a detailed description of content and process. The search did not obtain detailed descriptions; it would have required a much greater expenditure of energy than was available.

3. Cost. Since the Northwest Regional Educational Laboratory does not charge participants for the training provided in field test workshops, a viable cost comparison and cost-effectiveness analysis was not possible.

FINDINGS OF THE ALTERNATIVES SEARCH

The following is a comparative anlaysis of the 12 alternatives and the *PETC* training program. The characteristics of each training program have been grouped in six major areas: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination. Abstracts outlining this information for each system can be found in Appendix F. Also included in Appendix F is an outline of the *PETC* training programs which describes their characteristics in greater depth.

Target Population

Three of the twelve alternative programs are described as being specifically for educators in roles comparable to those for which the *PETC*s are intended. One program is for premaster's degree graduate students. Four programs are described as applicable across fields, specifically including education. Three programs are described as designed for "behavioral science professionals" with no specific reference to education. One program is said to "tend toward business and industry."

Content Provided in the Training

Two of the twelve alternative programs provide some skills training similar to *PETC-I: Skills Trainers*, but none appear to provide training explicitly in the use of skills training exercises. Six are concerned with planned change, small group work and consultation similar to the content of *PETC-II: Consulting*. Some of these seem to include content similar to some of the prerequisite systems for the *PETC* sequence. There is some emphasis on data gathering and use such as in the *Research Utilizing Problem Solving* system. Some include communications and at least one includes material on conflict. Six of the alternative systems are concerned with organizational theory and organizational development practice. One is solely concerned with a matrix model for conceiving diagnosis and intervention.

While the areas of content focus in the alternative systems vary, they appear to be generally similar to the *PETC*s and their prerequisites. There does seem to be wide variability in the specific content offered. Quite a bit of the content of *PETC-I* and *PETC-III* seems to be exclusive. A fair amount of material in many of the alternatives also sounds

exclusive. Some alternatives sound complementary to the *PETC*s while others might serve as reasonable substitutes for some prerequisites or for *PETC-II*. In any particular case, closer examination of the content and consideration of the training procedures and strategies would need to be carried out to explicate the distinctions.

Workshop Procedures and Strategies

Procedures and strategies for the 12 alternative systems vary widely. They range from a totally preplanned structure at one extreme to a design that was spontaneously created as the workshop progressed at the other. As a sequence, the *PETC*s also include structural variety, moving from high structure in *PETC-I* to a fair degree of openness within experiential exercises and the practica in *PETC-II* and *PETC-III*. One of the alternatives simply provides didactic input on film, plus written questions to guide large group discussions. Several alternative systems seem to rely heavily on trainer expertise for content as well as process guidance. Others seem more like the *PETC*s in using prepared materials for content expertise. Most are described as placing emphasis on some forms of experiential learning. Four emphasize small groups or teams similar to the *PETC*s. Five stress use of case studies. One has a practicum like *PETC-II*. One has a back-home project which sounds more like the *Research Utilizing Problem Solving* prerequisite than the OD effort of *PETC-III*.

Expected Outcomes

Materials concerning three of the alternative systems do not include any statements concerning expected outcomes. A fourth is presented as an introduction to the field of OD. It offers expectations of cognitive clarity and an increased basis for making decisions about OD. The expected outcomes of a fifth system depend on how the

participant makeup influenced the design, but did include problem solving consultation skills. The other seven offer expectations of conceptual understanding, skill and some experience in OD work. There seems to be a varied comprehensiveness in the outcome of technical mastery of diagnostic and problem solving skills. The university doctoral program includes research and teaching skills. These last two outcomes are definitely not part of the *PETC* systems and their prerequisites. Otherwise, there is a lot of similarity at a general level between the *PETC*s and the alternatives. At a specific level, there appear to be many differences. The specifics of some of the alternatives sound more similar to the *PETC* prerequisite systems, whereas other sound closer to *PETC-I* or *PETC-II*. Considering the amount of training time provided, none sound as comprehensive as the combination of the *PETC*s and their prerequisites with the possible exception of the university-based program.

Trainers

Three of the twelve alternative systems are conducted only by the one or two specific individuals who created them. This is similar to *PETC-III* training which presently only can be conducted by its two developers and one other NWREL staff person. The university doctoral program is conducted only by the faculty of that university. Five of the alternative systems are conducted only by staff of the organizations where they were created. One is conducted by staff of the organization where it was created, but the staff members indicate they can and will train local trainers when desired. Two of the systems are conducted by a national network of individuals who have been certified as capable. These last two rely heavily on films, written material and group discussion.

Dissemination

The two alternative systems mentioned at the end of the preceding section concerning trainers were the only systems created with the same explicit intention of wide dissemination as were the *PETC*s. These are each 3-day sessions and are correspondingly narrow in scope of content compared to the 39 days of *PETC* training. There is probably some overlap in content with the *PETC*s, although they sound more complementary than competitive. The other systems have no dissemination strategy. Most rely on mailing of brochures or word of mouth for their marketing.

As many as 750 persons are claimed to have been trained by 2 of the alternatives. One of these systems includes 10 days of training; the other includes 3 days. Another system claims up to 200 trained, another claims up to 150 and 2 more systems each claim 125. Another system claims 45 and another 57. Four gave no indication of numbers trained. During the past 3 years of development work, about 500 persons have started through the combination of *PETC* systems and prerequisites to the stage of completing *PETC-I*. Fifty-one have completed the full sequence through *PETC-III*.

Six alternative systems gave no indication of evaluation. Four indicate that participants fill out self-ratings at the end of training. For one, participants write out critiques at the end of training. One system claims evaluation has been conducted. Formative and summative evaluation activities, utilizing a variety of evaluation techniques, are part of the procedures by which the *PETC*s have been developed.

Conclusion

The alternatives search indicates there are definitely training systems in use which are similar and/or complementary to the *PETC*s and

their prerequisites in at least some aspects of their content and strategies. Most of the similarities are found in the small group training aspects of *PETC-I* and in the theory of and techniques for organizational development covered in *PETC-III*. Only one indicates a differential system for diagnostic and intervention analysis such as is found in *PETC-II*. This system uses a three-dimensional matrix combining diagnosis with intervention. A fair amount of the content of the alternatives sounds more descriptive of the prerequisite systems than the *PETC*s. With the exception of the university-based program, most are much shorter. It should be noted that several of the systems covered some material not contained in the *PETC*s.

Use of the alternatives is controlled by their creatros, even in the case of the two created with a dissemination network strategy in mind. Very little formal evaluation is indicated as compared with the development work done on the *PETC*s and their prerequisites.

In summary, it appears that process training is increasing across the United States. It tends to be costly. Only the university program and the *PETC* combination seem comprehensive and integrated. Some systems present options not covered by the *PETC* combinations. There is also much which appears unique to the *PETC*s.

SUMMARY AND DISCUSSION

In this final chapter the methods of the evaluation are briefly reviewed, results of the evaluation are applied to the evaluation questions and conclusions are discussed. In addition two recommendations thought to be helpful to the developers of *PETC-III* are listed.

REVIEW OF METHODS

This evaluation submitted the pilot version of the *PETC-III* instructional system to three types of evaluation investigations. Four workshops were conducted and information was collected from 41 of the 50 trainees regarding their judgments of the quality and efficacy of the instructional system and their perceptions of its relevance, utility and overall value. The instructional system was given to four impartial, expert reviewers and they were asked to make judgments about the significance, completeness, feasibility and social fairness of the system's goals, content and training strategies. Finally, a search was conducted to identify existing alternatives to *PETC-III* and to compare *PETC-III* to these alternatives in terms of the following: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination procedures. The primary audience for all evaluation activities was the system developers who desired information to use as a basis for making subsequent revisions.

DISCUSSION

Ten major evaluation questions provided the focus for the overall inquiry. Originally presented in this report's Introduction, these

questions are repeated for the reader's convenience in the section that follows. After each question is a summary of the information collected and analyzed in the evaluation.

Question 1: To what degree do persons trained in *PETC-III* during the pilot trials perceive the content, materials, activities and structure of the instructional system as being of high quality and effective?

On several questionnaire items intended to measure trainee perceptions of the content, materials, activities and structure of the instructional system, respondents reported moderately high or a high degree of positive regard. Using the two high points on a 5- or 6-point scale as an indicator of positive response, 83 percent reported that the workshop presentation was clear, 91 percent reported the content as appropriate for their experience, 61 percent claimed the materials demanded original thinking, 86 percent said the materials were interesting, and 56 percent reported the materials to be free from jargon. A similar positive response was observed concerning the activities and structure of the instructional system.

Question 2: To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being relevant and useful?

On several questionnaire items intended to measure trainee perceptions of the relevance and utility of the materials and the *PETC-III* training, approximately 80 percent of the respondents reported a high degree of perceived relevance. Respondents' perceptions of the usefulness of the ideas and learning were not quite as favorable. Sixty-eight percent reported that the training provided real "how to" help, and 78 percent said the learnings would be immediately usable.

Question 3: To what degree do persons trained in *PETC-III* during the pilot trials perceive the goals and objectives of the instructional system as clear and significant?

A high percentage of trainees in the pilot workshops reported that they saw the goals and objectives of *PETC-III* as clearly stated and of importance. Eighty-eight percent responded positively to the question on clarity and 95 percent said they believed that the goals and objectives were significant and important.

Question 4: To what degree do persons trained in *PETC-III* during the pilot trials perceive the training as being valuable in relation to costs incurred?

Of the 41 respondents in the pilot trials, 95 percent reported that the cost of acquiring *PETC-III* training was small or about right compared to what they had received from the training.

Question 5: To what degree do persons trained in *PETC-III* during the pilot trials perceive the pretraining materials as being adequate and sufficient?

On two questionnaire items intended to assess the affectiveness of the pretraining materials in terms of their adequacy and sufficiency, only 63 percent of the respondents reported them as being adequate or sufficient.

Question 6: To what degree do persons trained in *PETC-III* during the pilot trials report satisfaction with the training?

On four questionnaire items assessing trainee satisfaction with *PETC-III* and the overall training experience, over 80 percent of the respondents reported positively on all items.

Question 7: To what degree do persons trained in *PETC-III* during the pilot trials report a need for OD consulting abilities in the educational community and to what extent can *PETC-III* meet this need?

Of the 41 respondents 100 percent reported a definitely strong need for OD consulting abilities in the educational community. Over 90 percent of these same respondents saw *PETC-III* as having high potential for fulfilling this need.

Question 8: What type of people acquire *PETC-III* training during the pilot trials and to what type of organization do they extend consulting help during the practicum experience?

Descriptive data obtained from *PETC-III* trainees showed that a high proportion of trainees were experienced educators in staff or administrative positions in school districts. Over three quarters of the trainees worked with client systems of which they were also a member.

Question 9: From the perspective of impartial outside reviewers, are the goals, content and training strategies for *PETC-III* adequate in terms of their significance, completeness, feasibility, social fairness, etc.?

In an outside, expert review of the *PETC* systems, reviewers for the most part commended the instructional system for clarity of goals and the soundness of its conceptual logic. They did raise several concerns regarding the social significance and fairness of the instructional system. These included: the implicit parameters of the target populations for which the system is designed, the neutral value stance in regard to important social issues, the sexist and racist implications of some parts of the materials and the possibility that the learning accrued to *PETC* trainees could be misused.

Question 10: What are the existing alternatives to *PETC-III* and how does *PETC-III* compare to these alternatives in terms of: target population, content provided in the training, workshop procedures and strategies, expected outcomes, trainers and dissemination?

Twelve other training programs were identified as alternatives or critical competitors to the *PETC* instructional system. Target populations, content provided in the training, workshop strategies, expected outcomes, trainers and dissemination procedures varies greatly across the various alternatives. This along with weaknesses in the search for alternatives made critical comparisons in terms of outcomes and costs impossible.

CONCLUSIONS

In general, the information collected in the pilot evaluation of *PETC-III* speaks favorably to the quality and efficacy of the instructional system. Participant trainees in four pilot workshops reported very favorable reactions toward the instructional system and the training they received. Four expert reviewers, for the most part, concluded that the instructional system was clear in its goal and consistent in its conceptual logic. A search for alternatives did not produce any competitor exactly like *PETC-III* and when comparisons were

made between alternatives identified as close competitors, *PETC* was shown to be considerably more comprehensive in its scope.

Two major weaknesses in the instructional system surfaced in the process of conducting the pilot evaluation. The evaluators recommend these be considered by the developers as they work toward revision and completion of final versions of the product. One, trainees reported that the pretraining materials and strategies were insufficient to accomplish the task of acquainting them with the instructional system and for assisting them in acquiring a client system for their practicum consulting experience. The developer should pay particular attention to this feature of the system and expand the number of materials and experiences provided to trainees prior to the first formal workshop meeting.

Two, the developer should heed the criticism expressed by the expert review panel regarding the sexist and racist implications of the instructional system and issues of social equity. This may mean that some portions of the instructional system should be rewritten to meet more stringent guidelines pertaining to sexist and racist language. It also may mean that more meaningful disclaimers about the purposes and strategies of the instructional system should be developed. Another strategy would be to develop ways that various groups could adopt the materials to meet their specific criteria for social fairness.

Subsequent to the collection of information for this report but prior to formal publication, the developers have taken several steps responsive to the two recommendations discussed above.

First, the developers have developed a new set of instructional strategies aimed at helping trainers become more familiar with *PETC-III*

and adept at acquiring a client system for their practicum experience. A monograph consisting of case studies of five past *PETC* teams and some of the problems they experience also has been written and will be included as study materials for prospective *PETC-III* trainees. The effectiveness of the new strategies and materials remain unknown until further use and testing occur.

Second, the *PETC* system has been submitted to extensive editing and special attention has been paid to changing language that may be sexist or racist in its implications.

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Appendix A:

STAGES OF EVALUATION AND PRODUCT DEVELOPMENT OF THE IMPROVING TEACHING COMPETENCIES PROGRAM

The management plan for the Improving Teaching Competencies Program divides the work flow for the development of an instructional system into five phases: Planning, Pilot, Interim, Field Test and Outcome. Each phase consists of certain development, evaluation and field relations activities that culminate in a milestone report.

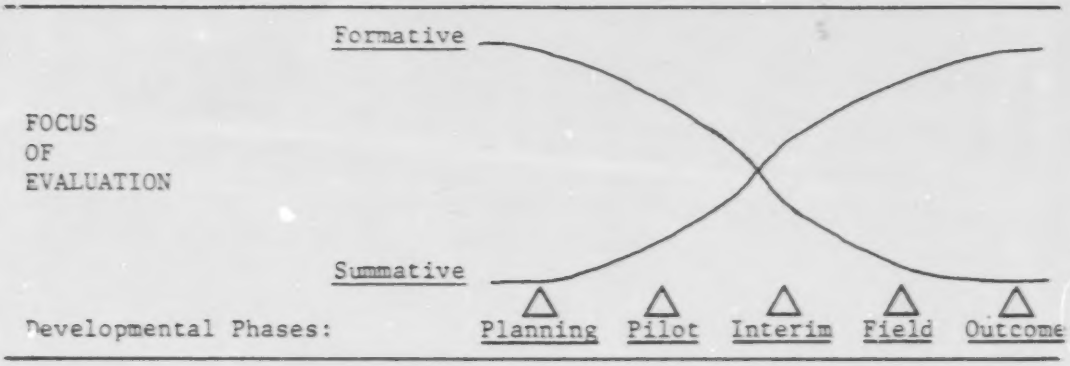
The range of activities associated with developing an instructional system are divided in five major categories: needs, objectives, product development, testing and implementation. These activities are partitioned among seven functional areas including management, development, field relations, dissemination, formative evaluation, internal summative evaluation and external summative evaluation. The matrix is not necessarily prescriptive nor are the evaluation relationships among each part strictly linear.

The specific activities engaged in during the development of an instructional system differ according to the phase under consideration, the unique needs of the specific product or change support process being developed and, occasionally, due to style preferences among work unit teams. For more specific and detailed statements, reference should be made to the development and evaluation plans and documents for each work unit.

Evaluation differs according to each phase of the development. During the initial phases, evaluation focuses on formative issues and provides information primarily for system developers. During the latter phases, the emphasis is on summative evaluation which provides information and judgments for potential users of the system. This shift in emphasis is illustrated in Figure A.

Figure

Evaluation Emphasis in the Developmental Phases



The following paragraphs describe in general terms the ways development and evaluation activities are organized for each phase of product development.

Planning Phase. In this phase, several key activities provide the focus for effort. The initial conception of the proposed instructional system is described along with its intended objectives. A need for the proposed system is documented, and evidence provided that adequate conceptualizations and instructional strategies exist or can be developed feasibly for the proposed training package. Initial development, evaluation and dissemination plans are produced, as are timelines, staffing needs and budgets.

Pilot Phase. In this phase, a prototype of the instructional system is developed and tried out on a small group of users from the target group. Objectives of the system and entry conditions for participants are clarified. Program evaluators provide formative evaluation information to assist developers with revisions. The information includes observer and trainer assessments of participant involvement in the activities, measurements of participant satisfaction with

the content, strategies and utility of the system. The workability of the activities, the logic of the content and the quality of the teaching aids and materials are also assessed at this phase by the user groups. Description and preliminary assessment of trainee outcomes are initiated.

The collection of information regarding the marketability and costs of the instructional system commences during the pilot phase as does the documentation of the developers' claims regarding the intents of the system in comparison to existing alternatives.

Interim Phase. During this phase, the instructional system goes through one or more cycles of revision and a nearly finished product is completed. By the end of this phase, the appropriateness of objectives has been determined, statements of objectives finalized and instrumentation to measure these selected or developed. For instructional systems requiring a workshop format, specifications are determined for desirable workshop conditions and qualifications for effective trainers.

The major focus of the evaluation activities for this phase is on confirmation of the system's ability to produce specified short-term outcomes and to test the workshop conditions, trainer qualifications and dissemination feasibility. This may be accomplished partially through conducting a "criterion workshop" designed to resemble closely the field conditions. The basic decision served by evaluation is whether the instructional system is ready for internal summative evaluation and adequate for comprehensive field and outcome testing.

Field Test Phase. In this phase, minor revisions are made on the instructional system and a product close to finished form is expected to exist. Also, in this phase, an internal summative evaluation will

focus on assessment of short-term outcomes of the instructional system. Specifically, this means finding answers to questions regarding knowledge, awareness and attitudinal growth and participant performance change that can be expected as a result of active participation in the system's training design under field conditions with typical trainees, trainers and workshop settings. Variables related to problems of installation and dissemination may also be examined at this point.

Outcome Phase. During this phase, which may occur simultaneously with the previous phase, the instructional system is finished and internal summative evaluation will assess the system's ability to produce, not only specified short-term outcomes in terms of participant satisfaction, knowledge, awareness or attitudinal gain and performance change, but also transfer, retention and impact upon secondary audiences such as students and/or peers. At this point evaluation plans are made for external summative evaluation studies such as critical comparisons between the outcomes of the instructional system being evaluated and outcomes produced by other relevant treatment efforts. External summative validations of the product are also completed in this stage.

Appendix B:

PETC-III BACKGROUND QUESTIONNAIRES

Version A
Version B

VERSION A

Name_____
System *PETC-III*_____
Trainer_____
Site_____
Date_____ Sex_____ Age_____

BACKGROUND QUESTIONNAIRE

1. HOME MAILING ADDRESS: Street_____ Phone_____
   City_____ State_____ Zip_____
   (This is necessary for NWREL to acquire followup information)

2. WORK ADDRESS: Street_____ Phone_____
   City_____ State_____ Zip_____

3. ROLE: Give your position and then check appropriate space below:

   Position:_____

   ___Preservice trainee
   ___Inservice teacher
   ___Administrator
   ___Teacher aide
   ___Supervisor or Coordinator
   ___Teacher educator
   ___Other (write in)_____
   ___Multiple roles (please list)_____

4. YEARS EXPERIENCE IN EDUCATION: Check appropriate space below:

   ___0 ___1-3 ___4-6 ___7-10 ___10 plus

5. HIGHEST DEGREE OBTAINED:
   ___BA ___MA ___Doctorate

6. INVOLVEMENT IN OTHER NWREL INSTRUCTIONAL SYSTEMS: (Check + if participant; 0 if trainer)

   ___Interaction Analysis
   ___Facilitating Inquiry
   ___Higher Level Thinking
   ___RUPS
   ___SAFE
   ___Conflict-Negotiations
   ___Interpersonal Communications
   ___Interpersonal Influence
   ___Group Process Skills
   ___*PETC-I*
   ___*PETC-II*

7. BRIEFLY DESCRIBE YOUR PRIMARY CLIENT SYSTEM (Name, etc.):
   _____
   _____
   _____
   _____
   _____

8. WHAT IS YOUR ROLE RELATIONSHIP TO THE CLIENT SYSTEM:

___External
___Internal
If internal, please explain role relationship_____

_____

_____

_____

VERSION B

BACKGROUND QUESTIONNAIRE

Please do not write in this margin

1. Name _____

2. Home Address: Street _____ Phone _____
   City _____ State _____ Zip _____

3. Work Address: Street _____ Phone _____
   City _____ State _____ Zip _____

4. Age: _____ 1-2

5. Sex: (1) ____ F (2) ____ M 3

6. Position: 4-5
   (1) ____ Teacher
   (2) ____ Administrator
   (3) ____ Staff
   (4) ____ Other (specify)

   (1) ____ Primary, 1-3
   (2) ____ Elementary, 4-6
   (3) ____ Jr. High, 7-9
   (4) ____ Sr. High, 10-12

7. Highest Degree Obtained: 6
   (1) ____ BS/BA
   (2) ____ MS/MA
   (3) ____ Ed.D./Ph.D.

8. Years Experience:
   ____ Teaching 7-8
   ____ Administration 9-10
   ____ Staff work 11-12
   ____ Consulting 13-14

9. NWREL Instructional Systems Previously Attended:
   (Indicate with a (1) "S", and a (2) "T", those systems where you were a Student or Trainee, respectively.)

   15 ____ Interaction Analysis
   16 ____ Facilitating Inquiry
   17 ____ Higher Level Thinking
   18 ____ System Approach for Education (SAFE)
   19 ____ Conflict-Negotiations
   20 ____ Interpersonal Influence (IPI)
   21 ____ Interpersonal Communications (IPC)
   22 ____ Research Utilizing Problem Solving (RUPS)
   23 ____ Group Process Skills
   24 ____ *PETC-I*
   25 ____ *PETC-II*
   26 ____ *PETC-III*

10. Additional Training:

    In addition to the systems listed in Question 9, please indicate below all other training experiences you have participated in related to organizational development, consulting, or problem solving. Please specify whether you participated as a student or trainer, when the training took place, and what the general nature of the training was. (Include courses, workshops, practice, on-the-job training, etc.)

11. Consulting Experience:

Indicate below your consulting experiences over the past five years. Do not include consulting which was only done as part of GPS, *PETC-I* or *PETC-II* training.

Please do not write in this margin

27-29 ____Approximate number of clients a year

27-29

30-32 ____Average number of days a year spent consulting

30-32

General type of client system (or list range of clients worked with):

General nature of usual consulting problem or task (or list range of consulting tasks worked on):

12. Date: ____/____/ 1975
33-34 35-36 37-38

33 34 35 36

13. Workshop: (1) ____Seattle A
39 (2) ____Seattle B

37 38

39

X = column number, X = value

Appendix C:

DOCUMENTS RELATING TO FINAL QUESTIONNAIRE

PETC-III Final Questionnaire
Letter to *PETC-III* Graduates
Open-Ended Responses from Final Questionnaire

FINAL QUESTIONNAIRE

Name: _____

Workshop: Seattle A (1) Seattle B (2)
5

Date: _____
6-11

Please do not write in this margin

1 2 3 4

5

6 7 8 9

10 11

12

A. To what extent has this workshop fulfilled your expectations about what you personally might get out of it?

1. Has not come up to my expectations /___/___/___/___/___/___/ Has exceeded my expectations
12 1 2 3 4 5 6

B. Think for a moment about the informational materials, practice exercises and methods used in this workshop. All in all, how would you rate them? (CHECK ONE BOX IN EACH LINE)

3. Only restated or provided what I already knew /___/___/___/___/___/___/ Offered new insights, new ways of viewing old problems
13 1 2 3 4 5 6 13

4. Spoke to important issues, vital concerns /___/___/___/___/___/___/ Missed the important issues, vital concerns
14 6 5 4 3 2 1 14

5. Hard to understand, complex, full of "jargon" /___/___/___/___/___/___/ Clear, concise, understandable
15 1 2 3 4 5 6 15

6. Ideas, skills, methods can be used immediately under existing conditions /___/___/___/___/___/___/ Usage would require changes in conditions that I have no control over
16 6 5 4 3 2 1 16

7. Little "how to" help for my actual group work /___/___/___/___/___/___/ Provided real "how to" help for my actual group work
17 1 2 3 4 5 6 17

8. Material maintained my interest /___/___/___/___/___/___/ Material failed to interest me
18 6 5 4 3 2 1 18

9. Demanded much original thinking /___/___/___/___/___/___/ Demanded no original thinking
19 6 5 4 3 2 1 19

Please do not write in this margin

10. Practice exercises were of little or no value — Practice exercises were of great value — 20

11. Session time was well used — Time in the sessions was wasted — 21

12. Structure useful, promoted learning — Too structured, blocked learning — 22

13. Gained new insights about my style of consulting — Learned nothing new about my style of consulting — 23

14. Allowed time for reflection about self and personal growth — Did not allow time for reflection about self and personal growth — 24

C. Considering this workshop as a training program for colleges and school districts--(CHECK ONE SPACE FOR EACH QUESTION)

15. How would you rate it in terms of its potential for organizational improvement? — 25

Low potential / 1 / 2 / 3 / 4 / 5 / 6 / High potential

16. How would you rate this workshop compared to other professional education courses you have taken? — 26

Very Low / 1 / 2 / 3 / 4 / 5 / 6 / Very High

D. Consulting with a Client

17. In an overall assessment of your consulting experience, was it: — 27

Extremely valuable, worthwhile experience. Much learning accomplished. / 6 / 5 / 4 / 3 / 2 / 1 / Little value, no learning accomplished

What are the major factors contributing to your assessment?

18. What were the specific learnings for *you* as a result of your consulting experience?

Please do not write in this margin

19. Problems arise in almost every consulting experience. What sort of problems, if any, did you encounter?

E. In all honesty, how much do you plan to use the ideas, skills and/or materials presented in this workshop as an integral part of your work?

20. Extensively /___/___/___/___/___/___/ Not at all
28 6 5 4 3 2 1

21. How do you think this workshop experience will be of value to you in the future?

F. Now that the workshop/course is over, how would you sum up the experience?

22. How very /___/___/___/___/___/___/ Extremely
29 worthwhile 1 2 3 4 5 6 worthwhile

23. What are the major factors contributing to your assessment?

24. Which of the following costs did you incur out of your own pocket in order to attend this workshop? Please estimate the amount.

$_____ Travel costs 30-32
$_____ Room and board 33-35
$_____ Tuition or fees 36-38
$_____ Other expenses (please specify) 39-41

_____
_____
_____
_____

25. Did you give up potential income in order to attend (e.g., other jobs)?

(1) ____No 42
(2) ____Yes. If yes, please give an estimate of how much $____ 43-45

26. Considering the costs (e.g., monetary, time, etc.) that you
46 incurred in order to attend this workshop, how do you feel?

(1) ____The costs were too great compared to what I got out of it.
(2) ____The costs were about right for what I got out of it.
(3) ____The costs were small compared to what I got out of it.

Additional comments:

28 ⌊__⌋

29 ⌊__⌋

30 31 32 ⌊___⌋
33 34 35 ⌊___⌋
36 37 38 ⌊___⌋
39 40 41 ⌊___⌋

42 ⌊__⌋

43 44 45 ⌊___⌋

46 ⌊__⌋

Please do not write in this margin

G. Please circle the response that best reflects your opinion of the following characteristics of the workshop.

27. Please rate the *goals and objectives* for:

a. Clarity

47

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

47

b. Significance/Importance

48

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

48

28. Please rate the workshop *content:* Skills, concepts, principles and values for:

a. Appropriateness for your experience and understanding

49

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

49

b. Relevance for learning to be a consultant

50

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

50

c. Clarity of presentation and definition

51

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

51

d. Parsimony (little or no unimportant or not useful material)

52

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

52

e. Practical significance for successful consulting

53

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

53

29. Please rate the workshop *methods/strategies/procedures* for:

a. Appropriateness for learning to be a consultant

54

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

54

b. Practical usefulness in learning consulting skills

55

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

55

c. Efficient use of time

56

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

56

Please do not write in this margin

30. Please rate the preworkshop orientation materials and activities for:

a. How successfully they provided you with information you
57 needed

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

57

b. How successfully they gave you clear and correct expectations
58 about the nature of the workshop

Excellent	Good	Satisfactory	Needs Improvement	Unsatisfactory
1	2	3	4	5

58

31. Will you have the opportunity to actually do the kind of
59 consulting taught in *PETC-III*?

59

(1) ____Yes (Do you expect to do so?)_____
(2) ____No (Why?)_____
(3) ____Uncertain (Please explain)_____
_____
_____

32. Do you think time commitments and prerequisites for *PETC-III*
60 are excessive?

60

(1) ____Yes, definitely; could be reduced somewhat
(2) ____No, they are demanding but necessary
(3) ____No strong opinion either way

33. Did you need the approval or release of a supervisor in your organization to attend this workshop?

If so, would you mind if we were to contact that person about his/her perceptions of *PETC-III*?

If no, please provide a name, position and, if possible, a phone number or other means of contacting this person.

34. Do you believe there is a need in the educational community for
61 educators with organizational development consulting abilities?

61

Please check one:
(5) ____Definitely strong need
(4) ____Probably some need
(3) ____Probably not much need
(2) ____Definitely no need
(1) ____No opinion

35. Please rate the potential of *PETC-III* for meeting such a need:
62

62

Circle one: Excellent 5 Good 4 Fair 3 Poor 2 None 1

80

Northwest
Regional
Educational
Laboratory

710 S.W. Second Avenue • Portland, Oregon 97204 • Telephone (503) 248-6800

July 21, 1975

During the past year, you were involved in *PETC-III: Organizational Development* training. The *PETC-II* system, developed by the Northwest Regional Educational Laboratory, is going through the final stages of evaluation. In order to complete this project, we need your help in collecting some final information. We would appreciate your cooperation in supplying us with this information.

Enclosed is a questionnaire which asks you to rate various aspects of the workshop, its strategies, content, process and applicability. It also asks for information on the costs you incurred while participating in the workshop. The questionnaire requires approximately 20-30 minutes to complete. We ask that you fill out the form as completely and honestly as you can. All responses will of course, remain condifential. We have enclosed a prepaid envelope addressed to the Lab to aid you in returning the questionnaire to us.

If you have any questions, please feel free to call (COLLECT) David Green at (503)248-6872 or Dick Arends at (503)248-6862.

Thank you for your cooperation.

Sincerely,

Richard Arends, Senior Associate
Improving Teaching Competencies Program

David Green, Staff Specialist

RA/DG:s
Enclosures

OPEN-ENDED RESPONSES

Question 17

In an overall assessment of your consulting experience, was it:

(6-point anchored rating scale)

6 = Extremely valuable, worthwhile experience. Much learning accomplished
1 = Little value, no learning accomplished

What are the major factors contributing to your assessment?

Rating	Response
6	Learning group sharing and assistance.
5	In addition to my personal learnings, the consulting experience during *PETC-III* resulted in a new program for my client. The program includes 8 paraprofessionals in a training program/working program with a $12,000 budget.
5	Made numerous changes as result of sessions.
3	Little actual contact with client.
6	There is no way like doing it to learn how--learned tremendous amount about myself and consulting and OD and organizations.
6	I believe that the practicum experience was absolutely essential for the learnings to have occurred which did for me.
6	I've used much of what I learned in a consultant role. The entry process was of significant value.
5	Opportunities to share experiences with client, with learning group and trainers and receive feedback. Simply the opportunity to practice consulting skills.
6	Learning how to make entry in my own organization during a crisis period. Having five people in the organization who had considerable amount of experience in OD.
6	Learned by doing. Mistakes I made were extremely valuable for personal growth.
6	The consulting experience provided a means to test out strategies, planning, skills, etc., without this experience the *PETC-III* program would have been of little value.

Question 17 (Continued)

Rating	Response
3	This was due to an overload of personal commitments as much as the *PETC-III* workshop. My personal limitations to fully pursuing my consultant/client relationship and thereby neither really satisfying my client or myself as a consultant. Difficulty in assimulating the bulk of *PETC-III* data as immediately useful. Limited professional opportunity.
4	The client really wasn't ready for what we wanted to do.
6	In the words of one of my friends, "Reality is often a jab in the eye with a blunt stick." My experiences punctured most of my myths about consulting, clearing the way for a more mature approach to it. What I learned during my experiences provided me workable materials for building that approach.
6	Each of the parties to the contract followed through. Client group situation was complex and challenging--we were able to intervene in a number of different ways. Working with Tom was important to me.
6	The organization of information needed by an OD consultant. The critique and intergroup experiences. The focus on a real client system. The help of the trainers.
3	Difficulty in securing client system, then client system turned out to be a group rather than an organization. Minimal trust between client system and one member of our team. Client system primarily political group rather than educational. We did not do our best for them and we didn't help them much.
6	My rating is based on what I observed happening in the District...and is continuing to happen. Also, the greater awareness of my influence, strength and weaknesses--when I can be helpful and when not!
6	Content new to me. I found it very worthwhile. Allowed time in sessions to digest content and apply it to one's own situation or consultation style.
5	The experience I gained. The positive changes manifested by the client system.
6	For the college; our team gave them valuable information. I think much of next year's administrative-faculty action will be based on findings we presented. We gave guidance in reorganization. Our college has a long way to go, but the Administration is moving and has plans for next year.

Question 17 (continued)

Rating	Response
5	Team member. Client system, (people involved). A lot more could have been accomplished under different circumstances. However, just that knowledge gained made the experience worthwhile.
6	My team member helped me with new perspectives. My client (organization) was already quite effective and efficient. Ruth and René are highly motivated and task oriented. The structure of *PETC-III* was not so restrictive.
5	Competence gained, know I can be a successful OD consultant.
6	Opportunity to translate theory into OD work. Plentiful feedback. Very supportive climate.
6	I was able to relate organizational actions to a cognitive system--understand and predict what was happening (the reaction of Seattle schools) when crisis of any failure occurred.
5	Provided procedures (matrices) for diagnosing and intervention.
5	Doing is most important. You really find out how you operate and how client responds in real situation. Far better than simulation.
6	Allowed me to use my learning style (with do-look-learn) and to clarify those learnings.
5	The project allowed us to formally begin a 3-year project in our district. It is now legitimized and underway--entry has been gained! Some structural change has already occurred.
5	Experienced directly much of what dealt with in training sessions.
6	Opportunity to do work with client and then have workshop as procedure for several months. Team work, learning group--*PETC* trainer with group entire time was a real plus!
4	Did not get into work with consultees enough. Not enough commitment from client.
5	Consultation with client became bogged down. Valuable learning came through discussion in learning group about pitfalls in consulting with client. Know what to do and what not to do in a similar situation.
5	Support from LG, client withdrawing during the course of training, CIB and training design.

Question 17 (Continued)

Rating	Response
6	Opportunity to share experiences with others. Confidence in trainers and resources, references, etc.
4	Limited time. Artifical. Had to seek out client, which didn't allow time to complete consultation process as would have liked.
6	Over 100 hours of work with the client system afforded many challenges, experiences, opportunities. We had a good support base with our T.U. and learning group and trainers.
5	This is a new experience and my only consulting experience has been in relation to *PETC*.
4	Application of skills, theory, etc. in practice situation (i.e., experiential) provided direct and useful feedback not possible in Lab or lecture setup!
5	Saw inside of large organization. Observed from initiation of new representative groups. Observed administrative reaction during crises as well as observing on building level.

Question 18

What are the specific learnings for *you* as a result of your consulting experience?

Increase in my analytical skills.

The perspective of looking at a total organization through its functions and operational characteristics. Also, a lot more understanding about the consultant's role, especially a more facilitative outlook.

Learned to consider own biases much more seriously. Care in planning intervention strategies and considering their consequences. Evaluations of functions and how to identify with some precision growth in those functions.

That I already knew more than I knew I knew. Put into cognitive frame what I had been doing "off the cuff."

That one needs a power base for influencing organization to change--either ligit or export or referent or something. That I OD is not an area of great expertise for me. That organizations need to see themselves as needing help and change to consult with them. Ways of diagnosing organization, ways to intervene much more.

An OD consultant can only facilitate change--the members of the organization make the changes. Line managers must have OD skills and knowledge if significant changes are going to occur within the organization.

Question 18 (Continued)

Concepts of organizational health and strength. Diagnosis, data collection, intervention strategies. Entry strategies.

Importance of entry and how to design more appropriate entry strategies. Data collection--importance of and specific tools, techniques. Identified hazards of which to be aware.

Learning how to diagnose and gain entry in my own organization, realizing the problems inherent in an internal consultant's role and learning how to apply learnings to different settings.

Entry procedures. Goal setting. Necessity of knowing the client and planning every step. Many others.

I learned the definite necessity of thorough planning for interventions, when dealing with a complex system especially. The value of a thorough debriefing and record keeping. My need to work in a team situation or to use other consultants' reactions--reality testers, etc.

That I am not personally capable to serve as a consultant at present, and that I have to become more professionally oriented in my approach to consultation.

client preparation very important.

First, success in consulting demands a definable rationale for every decision. I must know what I'm going to do, why I'm going to do it, what I expect to achieve, and how I think that's all going to happen. Only then can I assess and evaluate what actually does happen. Second, I have a lot to do. My sharper impression in this respect is that consulting requires consistent effort over a long period of time to achieve results.

That organizational structures and norms are really binding but that it helps to have in mind a concept of maturity and growth to gain perspective (knowledge). That I, as consultant, need to confront more actively, I tend to be more indirect in my interventions (skill, value issue). Tolerance for ambiguity is an important trait for a consultant.

Developed assessment skills and tools. Developed a sense of the "wholeness" of an organization system. Developed specific strategies for change. Developed an understanding of the cultural background in education.

Diagnostic tools and value of same. Understanding of OD involving structural and normative changes, rather than just substantive. Need for effective entry/exit strategies. Constant monitoring of consultants needs and motives. When not to use OD. How to explain OD to a non-acclimatized person or group. Universal Traveler. New roles and new value for team work, etc.

Question 18 (Continued)

Most significant--probably the value of careful PLANNING. Found the intervention theory format very helpful...also having the time available, a very competent team member and perceptions of L.G. in regard to our plan.

How carefully a training program needs to be installed within a system. The importance of a clear initial consulting agreement. The importance of being directly involved oneself in initial agreements about consultation or training program installation. Consideration of one's consulting style(s) in relation to the level of maturity and stage of growth of an organization.

That persistence is a good trait for a consultant to have. That a client may balk at following through in promises made.

I have a new picture of what I should be doing as a consultant. I have a developmental philosophy of organization development which I did not have before. I am finding the matrixes good for organizational application and also for me as a consultant. My skills have improved immensely.

Strengths and weaknesses in skills means of approach as a woman. Timing of contacts in client or potential client system. Importance of Dx and adhering to readiness levels of client system.

That OD is a complex and lengthy task. That the client must be committed. That contracting is a very important part of consulting. That change is slow.

Diagnosis sharpened. Interpersonal skills sharpened. Knowing I am influential and have impact.

This is a beginning, I need to commit myself to ongoing professional and personal development. I need to work in a team. Learning can be very exciting. I want to become a full time ODC.

How an organization at opinionated maturity phase immediately regressed to stereotypic phase when disrupted by any failure; I was able to negotiate conflict and exert effective influence in ongoing work situation.

Problem definition. Action techniques. Acquisition of skills.

I am no longer reluctant to do ODC work because of the experience. Gained confidence. I see how very important the extensive pre-planning is--and that you get results if you take the time to diagnose and plan. It isn't easy but it is rewarding.

Clarify ODC/top management--I learned they may be one in the same. Proactive learning is real. Skills increase (group--design, etc.). Conceptual power increase (OD--schools linkage).

Question 18 (Continued)

I don't want to be a skills trainer with my own client again. ODC's must work in teams with at least 2 members. OD technology is still very young and undeveloped. OD work and training is a part of management training.

Behaviors are quite predictable under given circumstances.

Ways of dealing with problems that were brought to learning group, e.g., techniques of confrontation, what I might have done. Evaluation of design, interventions.

Different approaches. Lots of what not to do.

Ability to express self in small group. Appreciation of teamwork approach. Need to be more confrontive. Need to take initiative--not always maintain counselor role. Allocate more time to team maintenance.

That I need to grow in understanding and skill to deal effectively and affectively with organizations in crisis.

Gain in confidence. New techniques and strategies of intervention. Improved skills in diagnosing, analyzing.

Experienced process of consulting. Learned by experiencing steps in entry, diagnosing, etc. mini scale.

Self-confidence. Importance of clear contract in entry. Cognitive learnings about leadership. Group process experience. How to help a group set up their own agenda. What team work is all about.

I have more skills than I realized. How to make better use of available resources. Adjust my maturity to level of group.

Entry problems and experience--need for specific explicit expectations--written in contract. Personal, behavioral feedback--team maintenance. Experience and growth in goal definitions, problem solving, analysis. Need for involvement and/or support from power administration in organization.

Reaction of system in crisis at various levels. Reaction of newly formed representative group. Positions taken in that group by in and out groups (how that changed with crisis). How risk taking varied with the nature of the group the representative came from, etc.

Question 19

Problems arise in almost every consulting experience. What sort of problems, if any, did you encounter?

The time sequence in working with my client, i.e. the end and beginning of school year in the middle of the project.

Entry problems that reoccurred every time, I thought they were solved. The role confusion of my clients developing the fact that I am an internal consultant.

Data became out-of-date so quickly. Continually wanted to do what I could do well rather than what client needed.

My partner became the consultant and I became a consultant to him. We were working with volunteer organization so didn't have clear visibility of client at times.

Had difficulty making entry.

Entry. Support as internal consultant. Members expected "expert" skills from practicum team.

Lack of accurate data. Could not establish a firm relationship with client. Client took one full year to decide to improve.

Insufficient data before making intervention. Time constraints. Commitment on the part of client (some members).

Gaining entry--coping with problems of which I was in part responsible.

Basic problem was that the client said one thing about wanting change, but all behavior pointed in opposite direction.

The clients lack of commitment to the project (consultation) as witnessed by their not taking time to prepare for meetings--reading our reports, etc. Deciding ways to confront the client constructively.

As a consultant team we met with difficulty in maintaining a solid working relationship with out client. We were also beset with internal personal conflicts as consultants which were deleterious to optimum effectiveness.

Partner too far away--didn't negotiate contract with client very well.

Logistics: My partner and I were separated by 100 miles, and the client was closer to him. His exposure to the client influenced his approach to the situation before I was introduced to the experience. We had to deal with a client which was always in the exit position with regard to the consulting relationship.

Question 19 (Continued)

Our team member dropped out. Getting hooked into the section leader's preferred strategies too much.

I was a consultant to my organization which consisted of myself and one other person. Problems arose around who was the client and who was the consultant.

Apparent difficulty in getting support for our PETC-III work from our workshop trainers and some other participants. Difficulty in getting critique assistance for our effort from two members who had value problems with our client system. Feeling on part of trainer that we were not ready for PETC-III. Made it difficult to approach client with confidence.

Teammate and I having time to do adequate planning. As we became aware of value, we set dates before leaving Seattle.

Lack of acceptance of some crucial administrators about the PETC-III practicum experience. Great difficulty in defining a client group.

The issue of getting the client to own responsibility for some of its shortcomings. Gaining acceptance as someone with some skills to offer.

I was not as visible as I would have liked to been. Our team did not move as rapidly with workshops, seminars, and meetings as I would have liked. The president did not want this and I had a feeling the faculty would have objected. We worked the matrixes and tried to determine things but a lot of the time we were unclear about strategy and failed to think in terms of many years.

Readiness level of client. Reorganization--beyond our control. Splintered group. Illness and distance.

Lack of time to devote to the client.

Low awareness of client system. "Part-time" nature of OD consultation.

Didn't pay enough attention to teamwork. Need to continually clarify expectations. Not well enough informed on the literature.

Missed opportunity to influence by not noting or stating norm breaking of group which pretty much killed "collaborative planning" goal/process of client group.

How to sort out all the data and where to begin.

My reluctance at first was a problem. The difficulty of the client wanting to know exact outcome and the problem of looking at us only as facilitators rather than experts with answers.

Question 19 (Continued)

Problems related to: (a) historical blockages in system, (b) lack of experience in skills/knowledge of PETC and (c) my allocation of energy in setting.

Inability to get good and comprehensive organizational assessment data. Time to work on the project in the real setting. Dealing with late adopters is tough.

Timing, i.e., we didn't always do the right thing at the best time.

Resistance from client. Lack support from administration in any real sense. Energy, March through June time span gives too little time for any major changes.

Noncommitment of client. Keeping a client. Demonstrating enough skills at beginning.

Client who was passive-aggressive. Client terminated due to levy failure and each of energy and motivation. Frustration with inability to expand client system.

Client apathy and ultimate termination.

Limited time frame to thoroughly plan, review references, etc.

In establishing working relationship with a client where needs were identified or help was sought.

Didn't have a clear agreement with one group what we and they (a) wanted, (b) method of intervention. I perceived uneasiness within me and group in dealing with results of the questionnaire.

Identity of client. Nature of client's goals.

Problems arising from crisis resulting in levy failure, i.e., confusion, apathy, anxiety--less than usual commitment to change originally identified.

The issue of power and how it was to be used. Sharing of resources. Planning break down during crisis.

Question 21

How do you think this workshop experience will be of value to you in the future?

It has sharpened my skills in many areas.

I am continuing to work as an internal consultant and will use the information and learnings extensively. I attended an OD lab for a week this summer and felt that my experiences there were much richer as a result of PETC-III.

Question 21 (Continued)

I continually find I use both styles of planning and language learned in the workshop. Assume this will continue. I happen to work with several others who have taken PETC and we plan together in the styles developed at workshop.

I have been using the concepts in doing consulting so know it will be of continuing value.

In working with organizations as a member to increase their health from inside. Understanding organizations and efforts to make changes in them, their problems, how they operate, what can go wrong, etc.

PETC-III put the umbrella over all my previous training experiences. It was the "peak experience" of my professional career upon which I constantly refer back to and grow from. I feel now that I will use to my fullest all of my experience.

I've been using the skills and information consistently since the workshop as an OD and staff development consultant. Most of the work has been in staff development where many of these same skills were most helpful.

In my day to day work I constantly use the consulting skills learned and plan to continue and make even more extensive use of skills.

I plan to concentrate on OD as an area of focus in the next few years. I plan to form ODC teams with 3 or 4 other OD consultants to carry out OD work in educational organization.

I will use the ideas, methods, etc. to further my own personal growth, and to help others gain insight and learn new skills.

It has already helped me in gaining entry into significant client system as an organizational consultant. There is potential to build from this client system to others. The knowledges, skills, strategies, etc., are invaluable to my present and future work.

This question seems to be dependent upon what my future will be. At this point, the usefulness of the workshop experience is nil due to rampant unemployment (mine).

Mostly, the knowledge base will be of value.

It appears that I will move into a management role in my job. I will use my experiences and knowledge in executing that role. I also intend to consult professionally. In this regard, my experience has been an invaluable aid.

Current, and for the next 2 years, I'm directing a Title III project and will be using an OD framework on the job. My plans are to continue in consulting work--either inside or external--and do some research on OD work.

Question 21 (Continued)

I have used the ideas, tools, manuals, etc. in several consulting experiences since.

I will be serving as an external consultant and staff trainer for many organizations in the educational, service, and cultural areas. I may also become a staff OD specialist for a major medical center here.

Believe much of the learnings and experiences have become a part of me and as such are used daily in my administrative activities at Douglas.

Gives me a different (additional) frame of reference for looking at organizations and their development which will be useful in future contacts with organizations.

Gives me some additional viewpoints on how to do consulting work with a client system.

I am applying to the army to join their OD group. I am changing my approach as consultant. I am working to get some small schools into OD. I would like to provide them services as an OD consultant. I met the superintendent and pricipal from.... We are working something out. I am working on a state grant (really federal monies) to begin next year with a large South Dakota school district in OD.

Knowledge, insight gained--be more prepared to confront and deal with complexities of organizational consulting, also more confident.

It will help with the diagnosis aspect of consulting.

To train the system. To provide for own continuous development. Opens up new possibilities.

This will be extremely valuable to me--I intend to spend much more time studying the materials and to form a permanent learning group with other PETC-III participants for growth and support.

In being a more effective group member--group leader--and in understanding/predicting behavior of groups. Opportunities as a change agent are now limited professionally since I've been RIFed and am returning to school.

My experience was mainly as an inside consultant. I found that experience to my liking and I find it comfortable to continue in that manner.

Feel able to deal with problems in a constructive manner and work with different types of people in groups or organizations to make operation more positive for all.

Question 21 (Continued)

I have a better understanding or appreciation for the time it takes to affect change and a higher respect for various differences in personal needs relating to the process of change.

As a superintendent--installing PODS, PETC. As a consultant/ trainer for money. As a continuous learner.

Yes, as I reflect back upon it and continue to review, integrate and apply the theory and procedures in the real organization.

Whatever other skills a person may have will require the support of organizational skills for best level of functioning.

In job, as facilitator, change agent, consultant.

I think the experience has increased my total skill bank and confidence thereof that it is an extreme value that with some more integration it will significantly influence my future.

Training will enable me to conduct workshop within my work situation. May be useful as part of skill pool of student service workers. May use to build own business.

It serves as a basis of a decision to move toward greater involvement in long-term consulting activities.

I have developed a long term OD consultant role with high school "B" complex staff and plan to expand to include "A" complex staff to reach over 100 staff members within the next 2 years. My OD interventions, it is hoped, will be seen as a success model that can and will be developed in other schools, the regional administrations and the central office staff.

If remain a counselor will use daily in work with principal and staff. May conduct independent training sessions for interested groups.

Personal growth. As a classroom teacher. In group process and in helping a group get a task done. Maybe as an OD consultant.

It depends on my work assignment. As a classroom teacher I can use many of the skills, but will not have a great deal of opportunities for consultative experiences.

In consultant type activities with future organizations or groups for when I will work. Broader understanding (cognitive) or organizations and complexity of change.

In any organization, I think I could be of help in relation to various OD related issues. I could be involved in a formal or informal way depending on the nature of my position and the nature of the organization.

Question 22

Now that the workshop/course is over, how would you sum up the experience?

(6-point anchored rating scale)

6 = Extremely worthwhile
1 = Not very worthwhile

Question 23

What are the major factors contributing to your assessment?

Question 22 Rating	Question 23 Response
6	I have a better background for further work as a consultant and more resources from which to draw.
6	The do-look-learn method maximizes results. Working with Emory/Pino is an invaluable experience in itself. The results were valuable for my client and for me.
6	Developed usable skills at workshops.
6	Never had OD put together with so much understanding before. Have a common experience with my coworkers in TENT--which I consider extremely valuable personally, professionally.
6	The personal learning-self learning. The experience in trying to help.
6	The degree to which I draw from my experience in workshop.
6	Mostly in terms of the help I received in improving staff development skills. Entry - data gathering - diagnosis - workshop design.
6	This is by far the most valuable post graduate experience I have had in that it is almost completely applicable to my assignment.
6	The skills acquired will be of extreme value to me. The cognitive growth in terms of new concepts and applications will be of tremendous value.
6	Personal growth. Professional growth.
6	See number 17-21 on previous pages.
5	It has given me insight into specific, direct problem solving approaches, which can be both personally, and professionally useful.

Questions 22 and 23 (Continued)

Question 22 Rating	Question 23 Response
4	Too much structure in program. Knowledge material excellent--low commitment by some participants.
6	All previous statements apply here. In addition, the workshop spurred my enthusiasm about being involved in the consulting experience. The experience of working with Ruth and René, as well as the rest of the group, was simply fantastic.
6	Practicum experience. Theoretical framework is useful for me and my work. Do-look-learn model. Working with Ruth and René.
6	It put all the training I've had into a complete focus.
6	Preparation for my career work in staff, management and organizational development. Graduate credit. Potential for being actually helpful to the organization I work with. Personal learning and intellectual growth. Materials and resource tools
6	Finding it valuable in my day to day work. Also, feel it has strengthened the organization I work in to the point of operating in a more coordinated manner.
5	The content of workshop was invaluable. However, some of the exercises within the workshop and the time sequences allotted to them were of less value to me.
5	Completed the PODS program. Gained additional experience and skills as an ODS.
6	No comment.
5	Material. Knowledge and manner of trainers. Workshop format. Fellow participants.
3	So much time spent at training sessions. Group members who were having unsolvable problems. The success of our team. So much travel and expense.
6	Own growth. Getting to know other trainers. Getting to know Ruth and René--fantastic people.
6	Learned a great deal. Grew personally. Really enjoyed the fellowship.
6	The total (all prerequisites) experience hangs together cognitively for me. Also I have confronted and dealt with my own skill refinements and feel more competent

Questions 22 and 23 (Continued)

Question 22 Rating	Question 23 Response
5	*PETC-III* sort of rounded out my experience/training in consultation from individual to organization.
6	Good feelings, increased demonstrated skills, good friends, feelings of accomplishment and it will continue.
6	Learnings (see #18-21). Value restructuring. Joy from being part of this beautiful experience.
6	The structure and theory are very useful for conceptualizing organizational development work.
5	The mixture of cognitive and experiential learning.
6	Brought ideas and concepts together from other labs. Reinforced learnings, gave feedback to me personally and as consultant.
6	Extreme gained knowledge of OD. Extreme gained knowledge of skills. Extreme gained confidence of skills and self.
6	Excellent trainers throughout. More than adequate materials and resources. Feeling of group that has developed over time. Support of colleagues.
6	Ability to apply concepts to a variety of situations, e.g., nonschool populations/organizations.
5	Strength of trainers. Responsiveness and support of participants. My confidence in NWREL materials.
4	Amount of time spent was great--wonder if learnings could have happened in shorter period of time using different strategies. Need experiences with opportunity to put learnings into operation.
6	See #1. Because of the learning experiences.
6	New knowledge. New self-awarness.
5	Cognitive and experiential learnings already commented on.
5	I think I have had a number of experiences that have improved my confidence and skill in dealing with groups.

Appendix D:

INITIAL STATUS REPORT

Form 2
PETC-III Log
1975 Version

Please fill out the following form as you begin your consulting activities in order to describe your initial view of the client group. The consulting team should complete this form as a group effort and submit it at the end of the workshop. The form will be returned to you by mail after a Xerox copy has been made.

1. Consultant's name:

2. Title or name of client group:

3. Number of people in client group:

4. What is the purpose or function of the client group within the organization of which it is a part?

5. If an organizational chart exists that shows your client's place in the organization, please enclose a copy. If a chart doesn't exist and it would be helpful to us in understanding your client, please provide a simple chart that shows your client's relation to the organization of which it is a part and your own place if you are members of the organization.

6. What is your organizational relation to the client?

   The client is (check one):

   ____part of my own work unit
   ____part of a different work unit in the same organization
   ____a member of a different organization (specify):
   ____other (specify):

7. Date of initial contact with client:

Please provide an overall summary of your initial assessment by completing the following:

Please describe the general situation as you begin to consult including the client group's primary tasks, difficulties, and strengths; and your probable role and primary difficulties.

Please state your goals for the clients.

Please state your assumptions and probable strategies.

Appendix E:

EXTERNAL REVIEW DOCUMENTS

Review Guidelines and
Preconference Correspondence
Description of Review Conference
Activities
Critiques by External Reviewers

I am pleased you will be part of the Review Board for the *Preparing Educational Training Consultants (PETC)* Conference in Portland, Oregon, from October 20 through October 23, 1975.

Enclosed are materials for your information; first, a brief description of *PETC* as well as descriptions of the other instructional systems educators complete prior to becoming a *PETC* participant. Also enclosed are the guidelines for your written critique as well as a roster of conference participants.

The first few days of the conference will primarily be devoted to having you become thoroughly familiar with the goals and procedures of *PETC* as well as briefing you on the other prerequisite instructional systems for *PETC* trainees. The developers as well as some *PETC* graduates will make presentations and be available to you as resources in preparing your reviews. During the last few days there will be continued opportunities for discussion among the Review Board and the developers and there will be time designated for you to prepare your written critique. This critique will be part of the final report for the National Institute of Education.

Reservations have been made for you at Riverside West Motel which is only a block away from NWREL for Sunday, October 19. If you will inform me of your arrival time I will pick you up at the airport. Please contact me at my home in Eugene about your arrival time or any other concerns.

We all look forward to a good exchange of ideas.

Sincerely,

Patricia A. Schmuck, Ph.D.
Research Associate
1956 Fairmount Boulevard
Eugene, Oregon 97403
(503)345-7425

Expert Review Guidelines

The purpose of this review is to obtain expert opinion of the merit of the *PETC* series of instructional systems. This information will be presented as part of a technical report to the National Institute of Education.

After reviewing all three systems, please write a critique that addresses each of the questions outlined below. The critique need not be limited to these items but clear judgment of merit, positive or negative, are needed for each question.

1. What is your expert opinion concerning the merit of the rationale and goals of the *PETC* series. Consider:

   a. clarity

   b. logic (conceptual integrity)

   c. social significance

   d. whether important claims and disclaimers have been made explicit

   Do you have any recommendations?

2. Have the target populations been clearly identified?

3. What is your expert opinion concerning the merit of the content of the instructional system? Content refers to the skills, concepts, principles, values and issues that are the subject of the system.

   Please respond generally considering the content as a whole and noting exceptions when appropriate.

   Please consider the following criteria:

   a. conceptual adequacy
   b. theoretical significance
   c. practical significance for successful consulting
   d. empirical justification for consulting practices recommended
   e. clarity of definition and presentation
   f. appropriate emphasis of content elements
   g. adequate integration of content elements
   h. parsimony
   i. sufficiency

   Any recommendations?

4. In general, are the *PETC-II* training procedures appropriate for the system's purposes, content and intended population?

   Any recommendations?

5. Is the role of the trainer clear and appropriate for such an instructional program?

   Any recommendations?

6. Discuss any positive or negative side effects you might expect from the system.

7. Discuss any additional strengths or weaknesses of the system in terms of your own criteria.

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using *PETC* to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare *PETC* with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

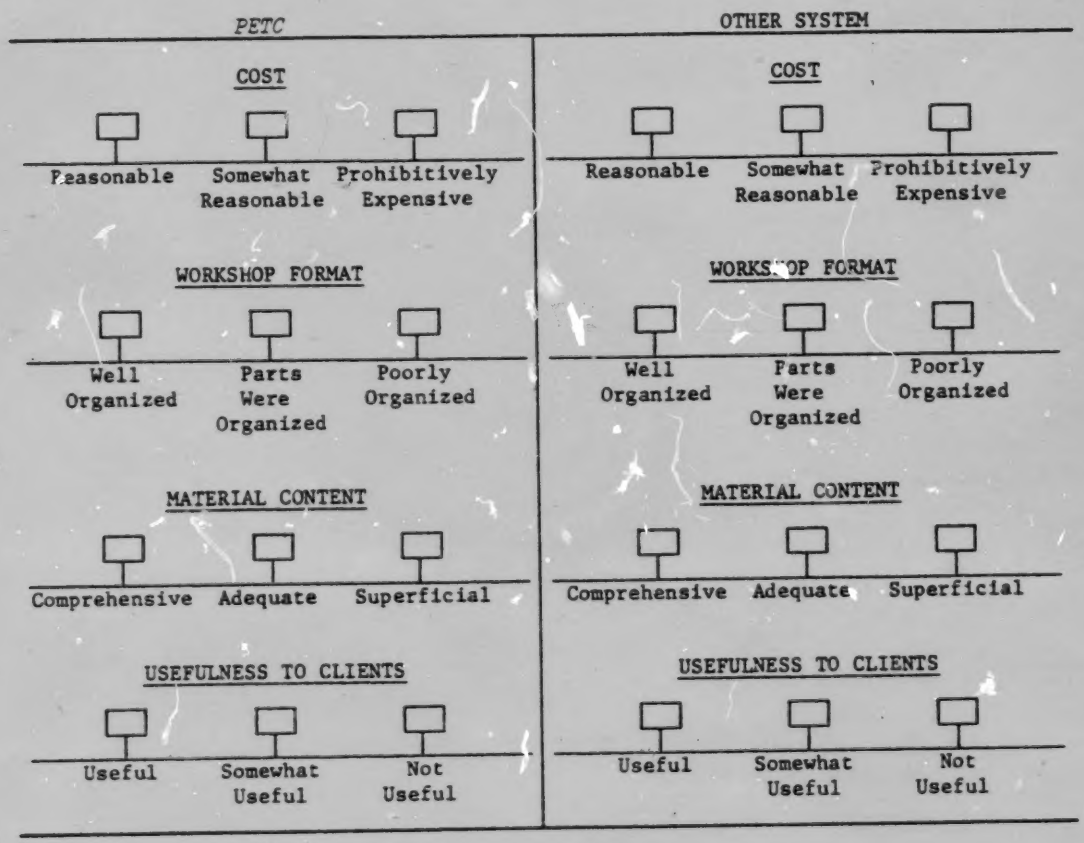
   Title _____

   Author _____

   Publisher _____

   Why did you choose this system?

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.



Which would you recommend your client system select?

____ *PETC*

____ Other System

PETC REVIEW CONFERENCE AGENDA

Monday, October 20

8:00 - 8:30 A.M.	Reviewers meet Pat Schmuck and Gary Milczarek at NWREL for informal introductions.
8:30 - 9:00 A.M.	Informal coffee with *PETC* Reivew Conference participants.
9:00 - 12:00 noon	Information meeting.
9:00 - 9:30	Chic Jung, Director of Program, to give background and purposes of *PETC*.
9:30 - 10:00	Gary Milczarek, Evaluator, to go over Evaluator Guidelines and clarify expectations for Review product.
10:00 - 12:00	Ruth Emory and René Pino, Developers, to present an overview and key aspects of *PETC I, II* and *III*. A walk through the instructional system.
12:00 - 1:00 P.M.	Lunch
1:00 - 2:00 P.M.	Reviewers meet with Gary and Pat to assess problems and set up procedures to facilitate the Review process.
2:00 -	Open

Tuesday, October 21

Morning	Open
1:30 - 5:00 P.M.	Reviewers meet with *PETC* graduates. Specific content and arrangements to be made with Reviewers. This meeting will take place in a home and be followed by an informal dinner for all conference participants.

Wednesday, October 22

Open

Thursday, October 23

Some kind of review summary with developers.

Some kind of conference evaluation.

Some kind of closure activity.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

	PETC		OTHER SYSTEM: _____	
EVALUATION CATEGORIES	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST				
WORKSHOP FORMAT (including ease of implementation)				
MATERIAL CONTENT				
PROBABLE SHORT-TERM EFFECTS				
PROBABLE LONG-TERM EFFECTS				
USEFULNESS TO CLIENTS				

Northwest Regional Educational Laboratory
710 S.W. Second Avenue • Portland, Oregon 97204 • Telephone (503) 248-6800

September 29, 1975

By now you should have received my letter, the contract, the brief description of *PETC* and under separate cover, the entire *PETC* package. Since the package weighs a lot and is inconvenient to carry, we will have another one for you in Portland.

We see the purpose of the *PETC* Review Conference to facilitate your task of writing a summative review of the *PETC* instructional system. Furthermore, we understand the enormity of the task we ask--to review a system requiring several weeks of participant commitment. Therefore, we have left much of the conference time open so it can be arranged according to *your* needs to get the job done. We believe certain decisions could not be made without consultation with you and other reviewers since you know how your time could be spent most profitably.

We have arranged a minimum of pre-planned activities that we think will be helpful to you. Although there are only three meetings planned on the Review Conference Agenda, the developers will be available during the whole conference period. It will be up to you to determine how much dialogue and interaction you wish to have with them.

Included is the agenda for the conference as it stands now.

Again, please let me know your arrival time and I will plan on meeting you.

Sincerely,

Patricia A. Schmuck
Research Associate

PAS:s

DO NOT WRITE THIS AREA

PETC Conference Participants, Portland, Oregon, October 20-23, 1975

Review Board

Ann Burr, Elementary School Teacher, member of the Cadre of Organizational Communication Consultants, Eugene, Oregon

Bunyan Bryant, Associate Professor, School of Natural Resources, University of Michigan; formerly member of the Educational Change Team

Gene Mulcahy, Trustee to the Knox Foundation, Assistant Superintendent, Hartford Public Schools; formerly Director of Shanti School, Hartford, Connecticut

Bonard Wilson, Consultant, Spokane, Washington; formerly UNESCO Consultant for training and member of Human Development Institute, Atlanta, Georgia

PETC Development Staff

Charles Jung, Program Director
Ruth Emory
René Pino
Richard Arends
William Ward
John Lohman

PETC Evaluation Staff

Gary Milczarek
Richard Arends
Patricia Schmuck
Jane Arends
Warren Bell

PETC Graduates

Tom Wilson
Jim Forneris
Cecelia Tompkins
Walt Stickel

Description of Review Conference Activities

On the first day the following people made presentations about *PETC* and the review procedure:

1. Charles Jung, Director, presented the Purposes and Goals of *PETC*
2. Ruth Emory and René Pino, Developers. presented an Overview of *PETC*
3. Gary Milczarek, Evaluator, discussed Product Expectations for a Summative Review
4. Richard Arends, Evaluator, reviewed Evaluation Results of *PETC*

Time was provided for the reviewers to begin their study of the materials and additional plans were made for the remaining days of the review conference.

During the first day of the conference the agenda had been arranged for maximum input from the NWREL staff involved in *PETC*. There were times allotted for formal presentations and for dialogue between the Reviewers and the *PETC* staff. By the end of the day the expectations and work tasks were clearly delineated and the reviewers collaborated on the conference agenda by determining their needs for further discussions, feedback and work time.

On the second day work time was provided for the reviewers in the morning. In the afternoon the Review Board met with five graduates of the *PETC* series.

The reviewers designed the afternoon for maximum learning about the experiences of five individuals who had participated in *PETC*. The reviewers requested that no member of the development or evaluation staff be present and only Pat Schmuck, the conference documenter, was allowed. The agenda for this meeting included:

1. Introductions (20 minutes)

2. *PETC* Biography for each graduate (30 minutes)

3. Subgroups (45 minutes)

   Reviewers and *PETC* graduates broke into subgroups to focus on one instructional system each.

4. Fish Bowl: Reviewers met inside and talked about their impressions, concerns and perceptions of strengths and weaknesses.

5. Fish Bowl: *PETC* graduates met and reacted to the statements made by the reviewers.

6. Debriefing of Total Group

The five *PETC* graduates included (a) Tommy Tompkins, Administrative Assistant, Metropolitan Learning Center, Portland Public Schools and *PETC* participant; (b) Walter Stickle, Staff Consultant, Sellwood School, Portland Public Schools and *PETC* participant; (c) Tom Wilson, Assistant Principal of Curriculum and Organization Development, Newport High School, Newport, California and Installer in the Orange County area for several workshops; (d) Robert McGlone, Executive Director of Training Enterprises New Techniques and Senior trainer for three *PETC-II* workshops; (e) James Forneris, Associate, Training Enterprises New Techniques, formerly with Seattle Public Schools and Installer for *PETC* in Seattle.

The third day consisted of reviewer work time and a reviewer feedback meeting. Reviewers met with program developers and evaluators for the purpose of presenting their preliminary conclusions about the strengths and weaknesses of the *PETC* system. This provided an opportunity for developers to share additional information and perceptions and for reviewers to seek clarification where needed.

The fourth day of the conference included reviewer work time and an evaluation of the conference. The Review Conference was evaluated

highly by reviewers and program staff; everyone concurred that it had been a useful, productive and exciting conference. The structuring of the conference allowed sufficient time for reviewer deliberation, reading and writing.

Review of the PETC Program

Dr. Bunyan Bryant
October 23, 1975

The series of programs designed to train educators with high level skills in organizational development was relatively well done, highly integrated and professional. It is evident that much forethought and energy went into the conceptualization and integration of these training materials; the nature and organization of such materials clearly indicated that they were designed to train those involved in school related organizational problems. To date, little has been done in viewing schools as organizations that are unique and crisis-ridden. Traditionally, the underlying structural assumptions of educational institituions have been treated as less important than isolated individuals or groups located within the organization itself. Too often we explain organizational concerns in terms of a particular indiviudal's withdrawal of emotional support from organizational goals and objectives, instead of the institutions' contribution to alienation and nonproductivity of its members.

The rationale for preparing organizational development specialists is both sound and much needed. The PETC system trains educators in OD to provide school managers with appropriate skills or resources at costs most reasonable than hiring external consultants. However, the rationale for providing OD skill training to school managers assumes that they are interested in using the technology to enhance humane aspects of quality education. Often the preoccupation with student control rather than improved education becomes the issue. Therefore, it is important to train not only school managers or teachers, or students, but certain types who

are interested in using the skills in ways that the designers of the training packages feel appropriate. Perhaps training students, teachers and administrators to serve as check points for each other may be worthwhile considering.

The training materials presented provide both logic and clarity with respect to instructional objectives and planned activities. Yet one has to be conscious of potential biases that are inherent within the system. For instance, the designers of the training materials referred to therein were probably white-affluent-male-adults, who were products of western culture and who were politically or culturally insensitive in conceptualizing interventions for social justice. Few references within the PETC programs were made to minorities or women--nor were there training designs by such groups. In addition, some of the designs particularly in PETC-I have been around for some time; they do not take into consideration the issues of racism, ageism, sexism, classism and ethnocentrism. Although well intended, the PETC programs may set the conceptual or theoretical framework for skillfully supporting or maintaining deep-seated cultural patterns. Even minorities often fall prey or implicitly agree to this conceptual or theoretical framework that is not always in our best interest. Yet it is unfair to "lay" this on the PETC system. Such issues are raised not to browbeat traditional white male consultants or the PETC programs, but to raise the level of consciousness. White males have had a tremendous impact upon all those involved and few attempts have been made to look critically at the shortcomings of well-established OD models or their uses.

The above issues are important: multiple forms of injustices are found at every level of the school fostered by complex organizational arrangements or personal or cultural or stylistic ways of behaving that

maintain majoritarian codes of conduct. An index of measuring the amount and extent of oppression found within the school is to diagnose how the school treats its students, women, minorities, and ethnic groups. In order for PETC to become more socially significant, it must become more sensitive to issues of social justice and involve minorities and women to more equally share the technology. This is a first step in addressing the biases that may be found in the "crevices" of the conceptual designs and their uses.

Although social justice issues were never outrightly disclaimed, the designers of the training programs clearly stated that the PETC program was not an encounter group, nor a sensitivity training group, nor did completion of the program necessarily qualify one to consult with organizations, nor was it appropriate for "pathological schools." The designers of the system claimed to be able to train people to do effective OD work in certain schools depending upon the school's profile and readiness for change. However, it was interesting to note that one of the graduates felt that PETC could be used regardless of the condition of the school. The evaluator, however, tends to agree with the designers in that there are certain schools where the PETC program would be less than adequate.

Based upon the above, it is recommended that: (1) PETC pay particular attention to racial and sexual biases of training models that are in use or change them if appropriate; (2) PETC select more minorities and women and students so that they can gain access to technology as a means of a strategy intervention that begins to deal with issues of social justice in schools; (3) PETC make a conscious effort to include or design other training models that deal with the issues of social justice and state how present models can be misused in subtle ways to more adroitly support oppression.

PETC target population raises the issues of social justice too. At one level the target population is fairly clear, but at the level of radical and sexual composition it is not so clear and needs to be dealt with more explicitly. In fact, high school students, too, should be a part of the target population, even though they are involved in some of the more basic programs. Often as adults we feel too threatened to learn from students; working through and learning how to deal with such feelings could be an important part of the program.

In spite of PETC shortcomings, it is probably one of the best conceptual and integrative organizational change and development pieces to date. As mentioned before, much forethought and integration and work has gone into its development, as indicated by its clarity, purpose, and organization. The need for this kind of training package is long overdue as indicated by the school's victim-blame approach to academic failure. Even though issues listed below are not specifically taken up in PETC, it is important to ask questions such as: (1) what kind of skills does one need to work effectively with oppressed groups; (2) is one always accountable to school management or can one be accountable to students rather than management. The questions listed above are important and should be dealt with more thoroughly.

The PETC system was clearly organized into a meaningful whole, integrating skills, theoretical concepts, and activities that went from simple to more complex. One graduate from the program stated that more skill-building could have gone on in RUPS in preparation of PETC-I, but was not a major problem. PETC-II builds off of PETC-I with some appropriate duplication of skill-building. The last program in the series raised some issues such as: (1) too much information to be digested and understood within the context of the training experience, (2) a clearer definition indicating the

differences between theories, conceptual models and hypothesis, (3) more time to deal with multiple organizational development models within the training event, and (4) an improved start-up design to help support those trainees with issues of strategy intervention.

Throughout PETC the trainer provides learning situations for the trainees, in fact, places a value upon this kind of learning. In PETC-III the trainer takes a more active role in disseminating information along more traditional pedagogical lines, but the training provides few visions of new schools or visions for ideal organizational change and development outcomes, or visions of a sexless or raceless school, or visions of a system of accountability of teacher and administrator to students or parents. Yet the consultant or trainer is constantly attempting to influence diagnosis and organizational outcomes. It seems that the consultant could also influence school systems to experiment or adhere to organizational structures that would be more accountable to and rewarding for organizational members. Without visions of new schools, PETC is deficient and places the consultant at great disadvantage with respect to influencing certain kinds of organizational change and development. There are some schools around that could serve as models even though few deal with large groups of student, teacher and administrator populations.

Will all this lead to successful consultation? This question is difficult to answer in that it really depends upon who decides success, i.e., the adult culture of the school or consultants, or students. There may be situations where the adult population of the school perception of success is at variance with the student perception of success. Traditionally, the adult culture has constantly defined success in terms of academic achievement rather than student satisfaction. The point can be most cogently

illustrated by the PETC part of NWREL. Does an external evaluator define success by applying statistical analysis to behavioral outcomes or do trainers of the PETC program define their own success in terms of personal satisfaction reported by trainees? Often those who have the power will determine the criteria, method and success of stated goals and objectives. Yet many policy decisions have been made in the absence of quantitative data; we have to decide whether scientific technology transcends or subordinates itself to educational values.

What about negative or positive side effects? With respect to the former there are several negative side effects that could result from a system. These are: (1) using the technology to skillfully maintain racism, classism, sexism, ethnocentrism, (2) using the PETC system without fully developing the necessary skills to consult to school systems, (3) disseminating the technology in ways that do not involve oppressed groups so that they may not be able to defend themselves against its misuse, (4) using the PETC system in ways that foster dependency of the client upon the consultant, (5) using only parts of the system or the various training programs out of context, and (6) focusing on this model at the exclusion of alternatives. Some of the potential or positive aspects of this training mode were: (1) including or juxtaposing training designs to deal with the issues of multiple oppression, (2) disseminating materials or training minorities, women and students to more effectively deal with rancorous school conditions, and (3) using PETC materials to change the curriculum in schools of education. These are some of the major side effects that could come from such a program. Other side effects are involved in the role of the consultant or trainer.

There is little indication that trainers are aware of their partisan or political role within a participant group. It is more than trainer biases but the "political correctness" of the trainer with respect to strategy interventions at the group or system level. Too often we are taught to recognize our biases and encouraged to be value neutral and objective. Often the difference between a trainer or consultant and an advocate is that the former usually has a contract with established power (and whose partisanship is more supportive of), while the latter usually has a contract with nonestablished power (and whose partianship is more above board and more supportive of). Clarity of these issues is important to trainers and graduates of PETC.

Why raise questions of social justice within the context of this evaluation? Not to raise such a question would be an injustice to the evaluation and it might encourage those in the PETC system to continue to circumvent the issues raised herein. We cannot afford to do that. The increasing rise of technocracy, the unequal distribution of wealth and power, the high rate of unemployment and underemployment among the poor, the elderly minorities and women, the loss of faith in many of our government incumbents, the corporate influence on our professed democratic process, the historical relations of exploitation of the third world leave many students and the disenfranchised frustrated, confused, and alienated. Contradictions in our history or democratic life or the free enterprise system are visibly disturbing. Often students distrust those who are the personfication of policies and values that produce alienation and despair. It is clear that the school does not operate in a vacuum and the macro forces of society have a tremendous impact.

Obviously, it becomes important that consultants seriously consider their values, goals and constituencies, roles and stylistic behavior. Those "trapped" in esteemed hereditary roles and socialization may more often opt to serve establishmentarians. Those who are interested in new consciousness or new training interventions will have to begin to understand more fully the macro economic, social, political forces that perpetuate or exacerbate social injustices. Such an undertaking will undoubtedly require personal risks, time, retraining and improved conceptual theories. But let's not get hung up on the latter or as Martin Luther King said "paralysis of analysis or unnecessary head scratching and plunge in wholeheartedly." The conceptual design of PETC can be helpful, makes an important contribution to that process if used "correctly." It is important to get such information in the hands of those interested in gearing up for social justice. In spite of the shortcomings of PETC, it does make a major contribution to the field in training individuals to do organizational change and development work in schools. What we need to do is to continue to build off these conceptualizations and make changes where necessary and watch out for potential biases that stifle rather than facilitate personal or academic or organizational change and development. This we can do.

(No alternative was received.)

Review of PETC I, II, & III

by Ann M. Burr

The rationale for the PETC series is very clearly presented in the Central Ideas Book that accompanies PETC III. The idea that planned, dynamic change is possible and that it will be the result of the use of these three programs is a stimulating one. As an educator I readily accept the need for such change and agree that the task is enormous. The goals of each program are also well defined and presented in a way that makes sense to the reader.

I have no quarrel with the idea that people need the skills of understanding relationships, of seeking change, and of dealing with complex technology. These are indeed socially significant. I am uneasy, however, with the unintentional outcome of the three programs--that not all people have equal access to the training. This, too, is socially significant! Because the programs are designed for specific populations who have positions of leadership, who have extensive previous training, and who have the time and resources to take advantage of PETC, trainees will largely represent Establishment--particularly white males. With intentional effort to recruit women and members of other races, and with some plan of financial assistance, this discrepancy could be corrected.

The claims and disclaimers are explicitly stated, particularly in the Central Ideas Book. The emphasis on the limitations of training in PETC I and II (that participation in the programs does not prepare an individual to be a trainer for the programs) is clear.

The authors had the target populations well in mind (except for the exceptions mentioned previously), and they are clearly presented in charts and in the text. I have a personal bias about limiting opportunities for training to the specified people in a particular role. I would not exclude any school or community personnel from entering the training, assuming that

the content and purposes had been carefully outlined to each person and that he or she accepted the responsibility for his of her learning. This, however, could be done by the implementers of a program; it is not the specified intention of the authors.

The content of the three programs is impressively concise and clear, yet outstandingly comprehensive. I have developed some minor learning packages for classroom use, and I can appreciate the many hours represented--hours of writing, trying out programs, and rewriting. In my opinion the programs will do what they say they will do--train a person to be an Educational Training Consultant with many skills and knowledge of their use. It is made clear that these skills do not include training in human relations workshops, but the materials do not state a recommendation that such training would be helpful or necessary for a truly competent consultant. I suggest that such a statement be included somewhere in the materials, perhaps as an addition to the section on prerequisites and limitations in the Central Ideas Book and also added to the requirements sections in introductions to the various programs.

The concepts are based on sound learning theory--that learning is most effective when the learner is actively involved, when he or she is given immediate feedback on actions, and when the learner is a voluntary one. There is another facet of learning research that shows that a person learns most effectively when he or she is involved in the design for learning and has some choices offered in ways of attaining a goal. A program designed to be taught by a fairly untrained person--such as the IPC and RUPS programs--has to restrict choice, but I'm wondering if the Senior Trainers in PETC II and III could involve the participants a bit more in the plans for their own training. This comment stems from statements made by some graduates that the material presented in PETC III was a conceptual overload. It is possible, though, that this problem has already been taken care of in the sending out

of materials in considerable advance of the actual first workshop of PETC III. I would still recommend that Senior Trainers make an effort to introduce the programs in such a way that participants feel included in the planning and not "done to".

None of the graduates that met with us complained that the material was too wordy or irrelevant, and in my review of them I found no instances of such. The references are sound, the exercises are appropriate, and the sequence of activities appears to be logical. There is no doubt in my mind that the trainees will find their training practical. The best of all worlds for an educator is one in which he or she can actually apply techniques in a "back home" situation. The graduates assured us that the techniques do indeed work.

For the most part the material contains a minimum of sexist structure. However, on page 1 of the Central Ideas Book and in the Introduction to PETC III: Organizational Development Training, there are statements describing the consultant as "He" and the practices as "his." I would strongly recommend changes in all such instances! I also object to the tendency to refer to classroom teachers as female and administrators as male--as Ms. Jones in the RUPS package--but I will try to confine my remarks to the PETC Programs.

The training procedures in all the PETC packages seem entirely appropriate since they are meant to be used in a specified way. The role of the trainer, too, is explicitly outlined and deviations are certainly not encouraged. For me, such a method would become untenable. I find that I can only perform instruction the same way once or possibly twice; after that, I add or subtract or change methods readily. This is a personal preference, and is significant only for possible trainers who have similar preferences. If a trainer felt the need, he or she could certainly change some of the sequences and, in my opinion, the results would be comparable.

There are many positive side effects that could come from use of the PETC systems. Change would be planned ones that came from within the organization. Clients would receive assistance in a variety of ways, not just one "tried and true" method. The plans for change would include input from various members of the organization and would be based on internal goals. A side effect from all this would be that members of the organization would feel included; they would also feel proud of the results.

An unfortunate side effect of the system is that minority groups may feel even more alienated, since the leadership represents the establishment. It is possible, too, that the Consultant has been trained without sufficient self-awareness of a personal nature. Even more likely, though, is the situation in which the hidden, subtle problems remain unsurfaced because the PETC graduate had little training in awareness of issues of social justice--issues which can be unintentionally perpetuated. The addition of some current social issues into the PETC material would be crucial!

From my own experience in the classroom and from the comments of the PETC graduates, I am sure that the concepts presented become really learned information through teaching them to others. This is not a given in the last two packages. I see no way around this, except that by being a cotrainer a graduate could then solidify his or her theoretical constructs by being a Senior Trainer.

These programs can, with the few additions mentioned, be of tremendous value to organizations that are aware of problems and have no trained internal consultants. They have been carefully and skillfully constructed. Congratulations!

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

   Title Handbook of Organizational Development in the Schools

   Author Schmuck, Richard and Phil Runkle, et al.

   Publisher Mayfield Publishing Co., Palo Alto, 1971 (soon to be revised)

   Why did you choose this system?

   First of all, I'm assuming the client system to be a school district, and I would suggest merits of this system and those of PETC. The school district, then, would make a decision.

   Dick Schmuck's method of developing a series of cadre of internal consultants provides a feasible alternative to the PETC programs because:

   (1) the costs are lower,
   (2) the installation time is shorter,
   (3) the resulting consultants represent all levels of a school's population, not just management, and
   (4) a wide variety of changes are possible within the first year.

   This "Cadre" would use materials described in the Handbook, plus other materials, to train others in the school district. Their original training would involve the cost of external trainers (as would that of a PETC Program) and whatever costs of internal training of the Cadre required to bring in new members...or new ideas...during the first year. The PETC Programs require external consultants as each program is introduced during a three-year period.

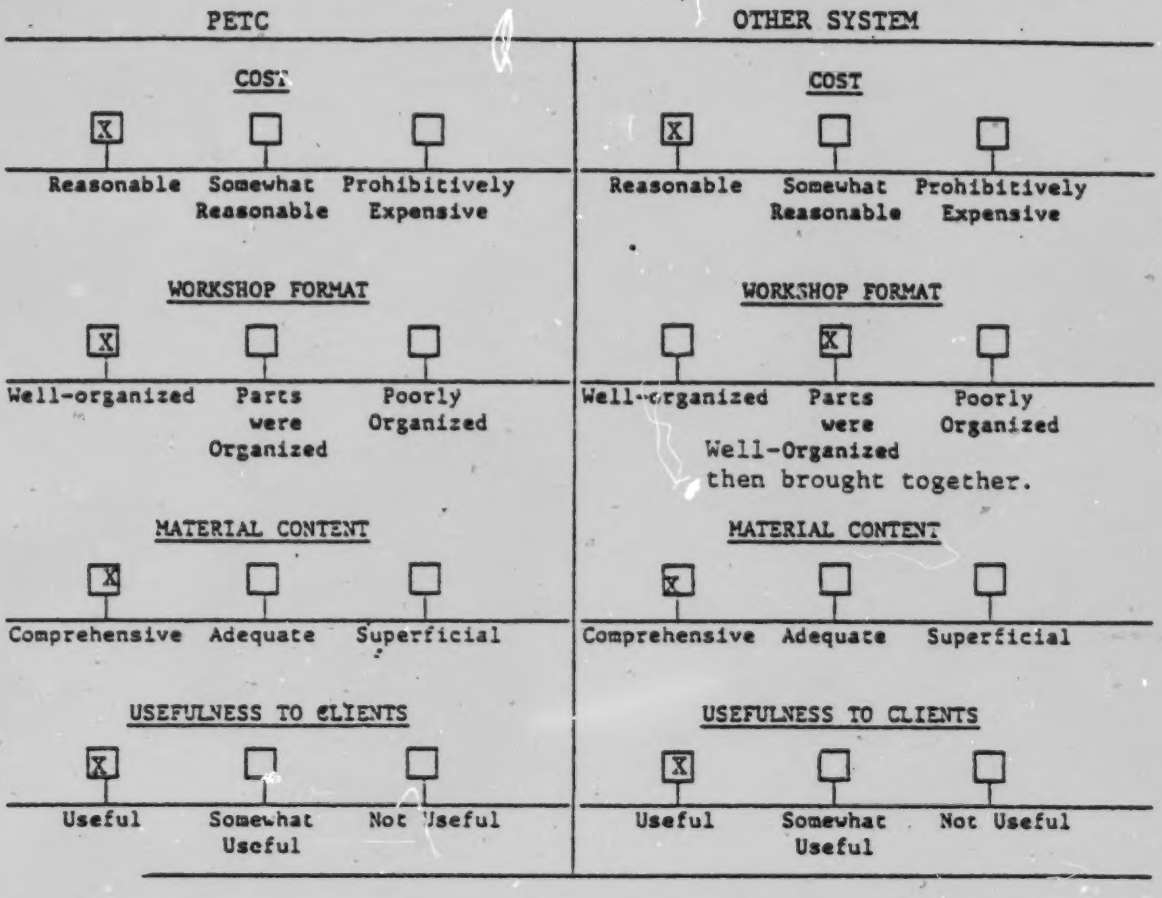
   Cadre activities are geared so that students are involved (IPC, RUPS, etc., can be used this way, too, with modification) and can become trainers. This is also true of custodians, cooks, secretaries, parents, teachers, plus administrators; PETC tends to be useful only for administrators or personnel, such as counselors, who have no classroom assignment or classified job.

   Cadre training includes methods and materials to encourage personal growth as well as professional competency.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM Internal Cadre	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Initial investment includes a package that can be reused many times. Trainees would most likely include personnel who do not need paid substitutes.	Initial investment is large (cost of packages plus cost of trainers and trainee-time).	Initial investment does include packages--does include trainer and trainee-time cost.	Trainee-time costs could be large because trainees include certified and classified personnel who might need release time.
WORKSHOP FORMAT (including ease of implementation)	Planning time for trainers is likely to be less.	Less opportunity for suiting workshop to specific needs.	Opportunity to design, with participants, a workshop that is flexible in length and format. Planning time becomes a learning situation.	Planning time is likely to be lengthy.
MATERIAL CONTENT	Well thought out. Concise, comprehensive. Evaluation data available.	Somewhat restricted (this depends upon the trainer and his/her expertise).	Wide variety available. Well thought out. Comprehensive, concise.	Material has to be pulled together from available files. Previous evaluation unavailable for specific design.
PROBABLE SHORT-TERM EFFECTS	Skills of system's personnel would be inhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year. Introduction of skills would be thorough.	Progress (assuming that the IPC, etc., were begun as basis for PETC) would be spread over a three-year period.	Skills of system's personnel would be inhanced the first year. Problems in classrooms, work groups, and schools could be dealt with...in the first year.	Trainer-time would be heavy during short-term.
PROBABLE LONG-TERM EFFECTS	Change could be instituted in a district system within a three-year period of time. The trainers are highly skilled (PETC-I, II & III are completed).	Trainers still needed as PETC packages are introduced Highly skilled trainers are probably few, and all from management.	Change could be instituted in district system within a one-year period of time. Trainer-time very small; internal people take over. Trainers include students, principals, parents, etc.	A variety of skill level existant in Cadre; 4 or 5 new people coming for training each year.
USEFULNESS TO CLIENTS	School district can count on help from skilled consultants and depend on many personnel being skilled in communiction, problem solving, decision-making, and conflict management.	Change may not have involved efforts of all levels of school people. Change may be minimal from point of view of students and parents.	School district can count on help from skilled consultants and depend on many personnel being skilled in communication, problem solving, decision-making, and conflict management.	Change may be more revolutionary. Change may have been based on various models some cognitive, some affective.

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.



Which would you recommend your client system select?

____ PETC first and then

_X_ Other System

I would recommend the Cadre system because it offers people an opportunity to be involved in the changes that happen to them. PETC Programs, as now written, result in the Consultant role being a management position.

Review of the PETC Program
(And Comparative Analysis)

Gene Mulcahy, Ed. D.
Oct. 23, 1975

I. Review of the PETC System

The structure of this section of the review is three-fold. The first section is a consideration of some of some of the factors in the review itself and in the review process with the attendant implications of threats to validity. The second section is a delineation of perceived strengths and weaknesses in the program and the third section is a specific response to the expert review guidelines as conceived by the program's evaluator.

Section 1: The Review Itself

The four reviewers over a period of four days had some significant advantages as the task of the review of the PETC program proceeded. One such advantage has been the availability of resources, including developers, evaluators, graduates, some statistical and evaluation data, and access to program developmental administrators. The processes of selection and congregation of the reviewer group would seem to have been effective in that the group was a collection of people balanced from the perspective of a number of identified variables. The differences in the members of the group provided unique perspectives and insights into the tasks assigned and yet the group itself functioned in a most compatible and constructive fashion with the group's own process and data sharing sessions being of great value.

Serious effort was made by the PETC development and evaluation staff personnel to meet reviewer needs. This included a high degree of commitment and energy to support and facilitate the reviewer tasks. The dialogue throughout the review between the reviewers and personnel connected with the PETC development program, and graduates of the PETC system has been honest and open. All interviewed displayed a non-defensive posture and an earnest effort to respond to reviewer query.

There have been, however, some ongoing difficulties with the review and the review process. The most serious difficulty for us was the magnitude of the materials to be reviewed and the relatively limited time in which to review them. The materials themselves, physically occupy an 8" x 12" space several feet high. To expect us to provide a sensitive reading, synthesis, and analysis of these materials in the time offered, was an unreasonable expectation. We have sought to achieve the task none the less, and designed processes for the maximum possible access to information in minimal time.

Likewise, some resources were not available, and some sources were accessible only for limited time. Because the long term evaluation process is in a continuing state, much of the data we perceived as desirable, was not yet available.

Given the limitations placed upon the reviewers, the value of the review itself is limited as a source of major influence in decision-making relative to further development in the program. This caveat, however, does not apply to some of the philosophical, social, and value issues raised.

Section 2: Strengths and Weaknesses of the PETC Program

Strengths

- Comprehensive
- Organized and integrated
- Humanistic
- High quality of material contained
- Emphasis of practicum
- Reasonably skilled people can be trainers
- Has early opportunities for practicing skills
- Includes a design for supervision
- Emphasis on understanding process
- Selection of consultant practicum experiences allows for trainee choice in areas of interest and style
- Well designed, offers support and structure
- Opens up trainees to research
- Offers a planned way to affect change
- Provides powerful tools
- High degree of clarity and integration of materials
- Use of groups and devices for trainee interaction
- Understanding of the value of conflict in growth
- High degree of structure, in some senses, extends the opportunity for choice and protects the risker

Weaknesses

- Does not address concerns of social justice
- Seeks to be value neutral
- Culture bias
- Elitist
- Phrased in sexist language
- A system based upon materials, rather than people
- Cannot utilize resources as they appear
- Trainees are in some ways expected to have white-middle-class values and experiences
- Trainees expected to be "system oriented people"
- There are no criteria for determining equivalency
- Weak on behavioral objectives
- Evaluation of behavior change not sufficiently well-developed
- Evaluation of consultant competency after graduation not sufficiently developed
- Client system groups are sometimes exploited
- Client system groups are sometimes artificial
- No process for assisting client systems to define needs and effectively use consultants
- Entire system lacks trainee needs assessment for training component
- No pre-assessment of skills or skills level
- Weak in the affective domain
- At some points, trainees report confusion relating to their not understanding the total system and relationship of parts thereto

- The time alotted for the program may be insufficient for the material to be learned
- In PETC I practicum there is no visible means of dealing with incompetent and unprepared leadership problems except for the co-leadership model
- Sometimes the timing of the introduction of new materials seems inappropriate
- The package is not open to in-flight correction by trainees
- There seems to be a need for a better overview of the total package

Section 3: Responses to the Expert Review Guidelines

No. 1: The merit of the rationale and goals of the PETC series:

a. Clarity: Although there seems to be some difficulty in the trainee's perception of the various parts of system as he or she proceeds through the system, the program itself evidences a great clarity of the total. This clarity is one of the most impressive aspects of the system. The PETC training system is like a carefully and delicately woven tapestry. Its remarkable and clear design is evident in its total. It has been artfully and lovingly constructed with a high degree of technical competence.

b. Logic: The sequential conceptions follow a consistent and logical pattern. The introduction of concepts and practice of that concept is generally highly appropriate and constant. A comprehensive, humanistic organizational development and change strategy has been devised and presented with painstaking care according to well-reasoned sequences.

c. Social significance: It is in this area that one of the major difficulties of the program lies. The PETC system does not concern itself with the issue of values. It seeks to be value-free and equally applicable to all client systems. It ignores the fact that many systems are by goal and practice, unjust.

One primary client of the PETC system is the American public school, and yet the American public school is designed to offer the tools of success to the privileged, thereby enforcing oppression on ages, sexes, race and classes not included.

The school and the society with which it is inter-dependent are at base supportive of an elitist minority. The important changes we are compelled to consider in America are basic changes in the social stratification, the access to information, and the availability to tools to a total population. The PETC system can be used effectively to support the racist, sexist, ageist and classist goals of the society at large and its educational system.

Consideration of these social, ethical questions of reform and revolution is not forthcoming either in the rationale or the design of the program. The fact that the materials in the programs themselves show consistent evidence of sexism in language is a further

support to the lack of consideration and concern in the development of the program for these vital social, political and cultural issues.

Johnathan Kozol, in his criticism of the free school movement and philosophy, suggested that this nonsystemic system of learning was analogous to the purportedly amoral behavior of German people of good will during the Third Reich. He suggested that these schools would peacefully build their birch bark canoes in the black forest while the Nazi ovens functioned a few miles away. The development of amoral products in education and the PETC product in particular, because of its value, is capable of functioning in a moral vacuum.

Another issue related to social significance is the failure of the PETC system to deal with the issues of affective growth. Clear behavior objectives should be established and processes designed to bring about an affective growth component in the program.

d. Claims and Disclaimers: The claims and disclaimers in the program are clear and well stated. The program, in fact, is somewhat humble in its claims. The potential and actual, in the package, transcends the claims made for it. Disclaimers have been appropriately stated.

No. 2: Identification of target populations:

There is a clear definition of appropriate target populations for the various components of the PETC program. The success of this identification has been verified by the fact that a high percentage of PETC graduates are in fact engaged in organizational development consultation work.

The difficulty, again, is a social problem. The assumption in the determination of target populations is an assumption that the consultant will be a well educated person with middle-class white values of some financial means. This assumption is a key determinant in the identification of target populations.

There is no consideration in the program for the fact that the appropriate organizational development consultant in a situation may be a student, or a black parent, or a member of the community not skilled in the jargon and concepts of the educationist. The program, then, can be guilty of establishing a consulting elite of the same class and values as those purported within the social and educational system. This condition mitigates against change and reinforces the racist, sexist, ageist and classist bases of the system.

No. 3: Content: Skills, concepts, principles, values and issues

a. Conceptual adequacy: The system has developed a humanistic and comprehensive organizational development strategy which is unique. The concepts work effectively,

both apart from and together with each other. The use of the practicum to reinforce the principle is impressive. Although we had no opportunity to observe it on a functional level, it is an excellent means of teaching, practicing and reinforcing learning.

b. Theoretical significance: The system is unusual for its humanism and insight into systems and strategies for changes within systems. It is a structured program supporting a fair amount of freedom and choice within the structure. In some senses, it is not sufficiently close to its own consulting design. It does not in its own design follow the principles it recommends to its trainees for the development of their own consultation designs.

c. Practical significance for successful consulting: A wide range of skills are made available to the consultants through the program. These skills can be employed in an impressive range of ways and in varying situations. The program effectively teaches these skills. Graduates report that they have used the skills taught and find them highly satisfactory in their consulting work.

d. Empirical justification for consulting practices: The project has apparently not had the resources available to it for testing to the level of significance desirable in creating empirical justification for the system itself. Two further developments are required: (1) a further effort to determine client satisfaction with the

consulting skills of graduates. (This involves the continued use and monitoring of logs and instruments of evaluation on a consistent basis.) (2) Further sophistication of measurement instruments in their application to determine behavior change in graduates and in the client systems they serve.

e. Clarity of definition and presentation: The PETC system maintains a high degree of clarity of definition and presentation. Descriptions are simple, straightforward and clear. Rationales are clearly and simply stated. The transition from theory into practice should be consistently and efficiently achievable. The training system can be affected by reasonably skilled trainers and does not require highly technical and highly skilled instructors and supervisors.

f. Appropriateness of content elements: Based on the insufficiency of this review, a single reading of the PETC materials and a cursory reading of some of the other segments of the total package--content seems appropriate and useful. The product combines the careful presentation of researched exercises and new materials, all are combined in a consistent and helpful manner.

g. Integration of content elements: Both from the reading and the testimony of graduates, integration of the materials seems well developed. The lack of preassessment instruments and a systematic means of determining trainee skill level and equivalency remain a problem.

h. Parsimony: Some graduates feel the total program should extend over a longer time because the quantity of the material commands this. The decision of the time, of course, is the individuals. If more data on the total concept and program in a more articulate system of self-monitoring were designed, that decision would be made with better data.

i. Sufficiency: The package is a comprehensive and articulate skills design. Adequate concern for issues of social justice and affective growth is absent.

No. 4: Appropriateness of PETC-II procedures

One of the very impressive things about the PETC-II materials is the clarity of definition of the role of the consultant and the definition of the parameters of the consultants' responsibilities. One deficiency in the PETC-II system is the potential for exploitation of client system groups and the possible artificial nature of those groups used as a training device. The identification and definition of these client systems is a skill requiring extraordinary sensitivity on the part of the trainer or senior trainer and is a serious potential weakness in the system.

Another potential difficulty in the PETC-II program is the entry into consulting relationships. The program does not seem to offer sufficient support and investigation of the difficulties in establishing client relationships. Neither is there sufficient concern given to the development

of strategies for client system readiness in the effective utilization of a consultant, a role of the consultant him/herself.

Finally, a reading of the system absent from an observation of its practice suggests potential difficulty in the trainees moving from concept to intervention. It is not clear how this movement is made and what supports and supervisions are available to the trainee in making this leap.

No. 5: Clarity of trainer expectation

This is an area of strength in the program. The function of the trainer in PETC-I and PETC-II is that of facilitator. The trainer is clearly expected to facilitate individual growth and group growth in training skills. In PETC-III it becomes very clear that the role of the trainer changes, becomes more judgmental and more instructional in the presentation of the content ideas toward the philosophy of organizational development and a strategy for implementation.

This change of style leads to the question of the credentialing of trainers and the delineation of skills trainers might be expected to possess. Graduates who have been trainers reported great difficulty in the development of criteria for trainers for PETC-III. Therein, may be a problem for the system, for the PETC-III trainer must have an extraordinary ability as an organizational development theoretician and practitioner. The trainer in this third system should be the kind of super person with extensive

background in organizational development consultation which the program avowedly seeks to avoid. Indeed, the very quality of the description of the role in its dimensions makes the identification of the appropriate trainer a matter of great difficulty.

No. 6: Positives and negatives

Responses to this question and to the succeeding one are implied in the section of this review entitled "Strengths and Weaknesses." From a technical product perspective there are no serious negative side-effects perceivable, except for the possible negative side-effects relating to premature group leadership responsibility in the second week of PETC-I. The difficulty perceived in this review is the political, economic and cultural difficulty expressed in response to several of the queries. This problem and the attendant amorality of the system is the most serious problem encountered. Unless some solution to that problem can be designed into the system, then the system itself may be both very valuable and potentially very dangerous.

The problem suggests the dilemma of Albert Einstein expressed in his famous letter to President Franklin Roosevelt. He created that thing with his genius which he believed would be of benefit and help to the entire world, yet he correctly perceived that the use of the precious gift of his intellect and insight was in a destructive fashion. Unless it is possible in some way to revise the

system so that the issues of social justice are clearly addressed, then the system itself fails in its goal to facilitate organizational, developmental consultancy for change.

II. Comparison of the PETC System with Another Organizational Development Training System

The system selected for comparison with the PETC program is one which is based upon a somewhat different set of assumptions. First, these assumptions will be delineated, then the system will be described and finally a comparison will be offered using the descriptors designed by the PETC evaluator.

Section 1: Organizational Development Consultant Training Package Assumptions

1. An articulated program of trainee role definition and needs assessment must precede a training design.
2. Clear behavioral objectives must be established by trainees and trainer prior to designing the training program.
3. A trainee designed training system responsive to trainee identified priorities is an effective approach to organizational development consultant training.
4. A comprehensive training program should include training in resource development.
5. Internal and external resources should be used in the training program.
6. If the trainees have ownership of the design, choice about the direction and control over "inflight" correction possibilities

in the training system, then investment in the training experience itself will be high.

7. The skills of ongoing personal and skill growth should be taught as part of the training system.
8. An organizational development consultant training package in contemporary America must place emphasis upon the burning issues of social justice which are key issues for the school and for the society with which the school is interdependent.
9. A successful training program must not be terminal.

Section II: Description of the Program

The training program proposed is a trainee/trainer self-designed program. Its dimensions will differ with differing groups of trainees. The design seeks to emulate the function of an organizational development consultant when functioning in that proper consulting role. It begins with an assessment, flows through to the development of behavioral and skill objectives, to the development of a design to meet those objectives, to the active involvement in the self-directed training design, and, finally, to the measurement and evaluation placed upon the priorities established.

The training package, then, will be different each time applied, dependent upon the style and priorities of trainees and trainers. A wide variety of materials, many not dissimilar from the PETC materials, would be developed as resources to the trainee and trainer groups. As the trainees proceeded through the program, they would gain greater awareness of the materials developed and the potential of those materials

in functional contacts. Materials in individual learnings would be applied in practicum situations and evaluated. Trainee performance in these situations would be carefully evaluated and supervised by trainers and other trainers.

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

   Title Organizational Development Consultant Training Package*

   Author _____

   Publisher _____

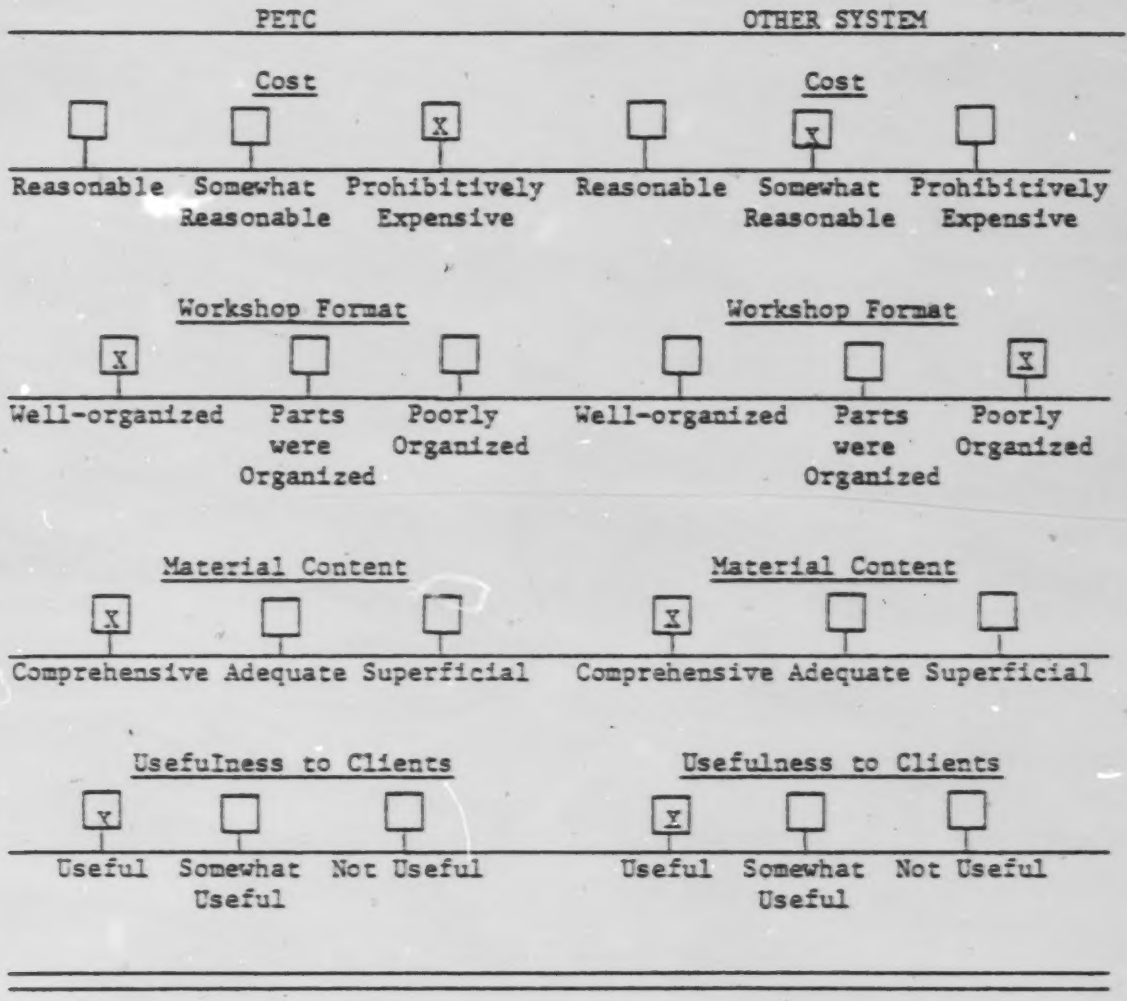
   Why did you choose this system?

*NOTE: This comparison was written on a hypothetical product. A more complete discussion of this description is given on pages 154-156.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Efficient trainer/ trainee ratio	Too expensive for poor people	Efficient trainer/ trainee ratio Training materials are of continuing value	May be too expensive for poor people Reasonable cost for establishment people
WORKSHOP FORMAT (including ease of implementation)	Clear	Sometimes rigid	Highly flexible Based on needs assessment	Requires higher degree of trainer skill and decision making
MATERIAL CONTENT	Constant and able to be supplemented	Perhaps overwhelming	Constant and able to be supplemented	
PROBABLE SHORT-TERM EFFECTS	Increased OD skills	Graduates may not be functioning as OD consultants	Increased OD, personal and perhaps political skill	Inavailability of some resources due to immediacy of need
PROBABLE LONG-TERM EFFECTS	Provides rich material for long-range and varied use	Does minimal affective growth	Includes ongoing self-activating design	
USEFULNESS TO CLIENTS	Broad overview and comprehensive system	Not based on self-defined needs assessment	Meets self-defined needs	May omit some important material

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.



Which would you recommend your client system select?

____ PETC

_X_ Other System

Review of the PETC Program

Bonard S. Wilson, Ed.D.
Leadership Institute of Spokane
Oct. 23, 1975

1. My opinion of the merit of the rationale and goals of the PETC series:
   a. Clarity: It seems to me the goals of the programs lack clarity, or perhaps, specificity would be a better term. They are couched primarily in instructional terms rather than in behavioral terms. Consequently, they are less effective in giving direction to the training and in serving as guides for evaluations.
   b. Logic: I see the logic behind the objectives as being sound. The concern I have is that the whole series is in a very logical order--each step following the other in a well considered logical sequence to the point that it cannot be altered to fit a psychological order that may be quite different from the logical order.
   c. Social significance: The goals are socially significant, in my view, as far as they go. They do not directly address themselves to some of the social issues of our times, in particular the ones of social justice, sexism, racism, ageism, etc.
   d. Claims and Disclaimers: Most of the claims and disclaimers have been made explicit, as I read them. However, it seems from the evaluations that a lot of participants have difficulty understanding these, so perhaps these need to be made more explicit, somehow. We were given verbally some disclaimers that were not included in the program and I would suggest that these be included somewhere.
   e. Recommendations: Objectives and goals should be stated in behavioral terms and the same objectives be used for guides in the training and for evaluating. It seems now that goals of the program are stated in instructional terms and the goals used for evaluation are stated

e. (continued) in instructional terms and the goals used for evaluation are stated in behavioral terms. I see confusion resulting from this.

2. Target Populations: The target populations have been clearly identified in each of the programs. I would like to see the targets include students, minorities among the targets now identified, and to include all personnel of the school system--janitors, bus drivers, parents, etc.

3. Merit of the content of the instructional system:

a. Conceptual adequacy: The concepts are adequate as far as they go. I especially like the experiential approach and the idea that this is only the starting point. It seems, however, that the concepts come primarily from white males and are in accord with the concepts generally accepted by the school establishment. Also, the concepts support a medical-model approach to consulting rather than the one I see as being more appropriate in which the client is allowed to remain responsible for his own behavior and is given help by the consultant to assess his needs, to plan corrective actions and to devise ways to evaluate his/her own progress. The concepts underlying the role of the trainer are of the medical-model, also. If a trainee discovers that he/she has needs not covered by the content of the workshop, it is seen to be best that he/she drop out of the workshop, rather than alter the "treatment" that is prescribed by the program and the trainer. I would like to see a program based upon the non-directive approach.

b. Theoretical significance: The theories upon which these programs are based is significant theory in the behavioral sciences. The force-field analysis, the use of consultants, the use of internal consultants, and the training of consultants, for instance, are supported

b. (continued) by valid and significant theories. It seems to me that the significance of the theories and the solid underpinning provided by these theories is a very strong part of the series. I would like to see more content that is based upon other theories of change and change agentry, however, especially non-medical model approaches.

c. Practical significance: The content is well designed to prepare consultants to perform the tasks they are being taught to use with the exception of content in the affective areas. The question of values of the trainees, their concept of persons, their concept of schools, how they feel about themselves and about each other in the training is left pretty much up to being dealt with indirectly. Unless the person had this content before he entered the series or went elsewhere to get it, he would be inadequately trained for implementing the rest of what he learned. The skills learned in the series are probably inadequate for consulting in a situation where social injustice was at the core of the problems. The content, naturally, does not cover other approaches that might be more appropriate in some situations.

d. Empirical justification: There is plenty of empirical evidence that the content is justified for training people to do the consulting that it is hoped they will do when they finish the series.

e. Clarity of definition and presentation: I am impressed with the clarity of the material and of its presentation. It should be understandable to almost anyone and if not, it could be easily explained by the trainer.

f. Appropriate emphasis of content elements: For the consulting approaches being taught in the series, it seems to me the emphasis on the content elements is very appropriate. It also appears that the trainer has freedom to alter the emphasis at any time he sees a need to do so.

g. Adequate integration of content elements: The content elements appear to be adequately integrated.

h. Parsimony: Having only skimmed the content and without the experience of being a participant or a trainer, I see little that could be left out. There surely is some though, since there are hundreds of pages.

i. Sufficiency: For the approach to consulting that is being taught, it seems that there is sufficient content. I am especially impressed with the quantity and quality of it. I would like to see more content on other approaches to consulting, at least if only to call attention to the fact that there are other approaches and other resources available.

j. Recommendations:

1) Content be added that would deal with helping clients learn how to use consultants. The consultant does this indirectly when she/he works with the client, but I think learning how to use a consultant is something that should be taught directly to clients.

2) Add content in the affective or gut level areas of learning for the consultant-trainee, and also content that will help her/him help clients deal with these areas. A consultant could graduate from this program and be unable to help clients deal with values, and feelings. She/he would have to have it before she/he started consulting or get it elsewhere on the way.

3) Add content that would fit populations who are directly concerned with the school system but are not now targets of this program.

4. Appropriateness of training procedures for the system's purposes, content and intended population: For the cognitive and skill aspects of the training, the procedures are very adequate for the intended population. The training procedures for the affective areas, in contrast, are very inadequate. A

4. (continued) conscious decision was apparently made in developing the program that the affective aspects would be altered to reach the other target populations that I have previously suggested should be included.

   a. Recommendations: Include some direct and planned for T-Group type experiences in all of the components of the series. This can be done by trainers who are trained to do it or by programmed and leaderless methods now available.

      Ensure that the trainers are practicing what they are preaching. I can see the PETC trainers, just like the rest of us, telling students to do one thing while they do another. I believe trainees train others as they themselves were trained.

5. Clarity and appropriateness of the role of the trainer in this program:

   a. The role of the trainer seems to be clear and appropriate, with the exceptions that I have already noted. The instructions for the trainer are clear, concise, adequate and appropriate. In addition he is allowed freedom to follow his own style. There may be too much freedom for the trainer in the case of a trainer whose values are not in line with the values underlying the program.

6. Side effects:

   a. Graduates I have seen tend to have a missionary zeal which may put off some people, but such conversions may have some desirable attributes for the trainers.

   b. Trainees may help a bad school system maintain itself or to resist changes that are needed. It depends much upon the motivation of the trainee and if insufficient attention is paid to the motivation of the consultant in training.

c. Trainees, even though trained for working in educational systems, should be able to consult with most any other group that had people problems.

d. This program has been designed as only a jumping-off point so many of its graduates will go far beyond the training they receive.

e. These programs could be adapted for training other kinds of consultants.

f. The programs could be taught for academic credit in colleges.

7. Additional strengths and weaknesses:

a. Evaluation: Inadequate evaluation has been done and adequate means for evaluating the series have not been developed. The developers and evaluators of the program have not succeeded where the rest of us have failed, is all that I am saying. It would be very helpful to have behavioral objectives that could be used by trainees and trainers in the training and by the evaluators to assess results.

b. Ivory Towerism: I wish the developers had been able to spend more time directly consulting with school systems while developing the program. Otherwise, I fear that the programs may be seen as too academic and/or labeled as ivory tower approaches.

c. I would like to see more flexibility in the design and in the trainers so they would be able to adapt more to individual needs of trainees. I believe trainees can best learn how to adapt to individual needs of clients by having it done to her/him in training.

d. The program seems to work and the participants are very pleased with what they have learned. Some graduates have spent a lot of time and money going through the program.

e. To my knowledge, it is the only program of its kind. It is a badly needed resource in the field of education. I hope that it is made available to all systems that can profit from its use.

f. My guess is that it is one of the least expensive ways for a school system to acquire the consultant expertise that it needs.

g. Most of the exercises, especially in the early part of the series are old friends and have been well tested.

h. People who enroll in PETC workshops are probably people who want to bring about changes in themselves and in the school systems so the program does not have to be concerned with motivating the trainees to learn and change.

i. The real strength of the program in my view, is the kind of people the developers are. Good training programs are not possible without good people as developers and trainers.

PETC REVIEW

For the following questions imagine that one of your client school systems is considering using PETC to provide an internal consulting organizational development and training capability. Please frame your answers in that context.

1. In your report to your client system, you are asked to compare PETC with some other program which you are familiar. The client system is interested only in programs for providing them with OD and training resources. Which system would you use for the comparison?

   Title "Not yet developed"

   Author Bonard S. Wilson

   Publisher _____

   Why did you choose this system?

   It will hopefully more nearly fit me, my philosophy and way of working.

   PETC would be brought in later by them, should we get that for and should they see it as a way of meeting their needs.

2. Please list the strengths and weaknesses of each system below in terms of the categories given. Write any additional comparisons on the back of this page.

EVALUATION CATEGORIES	PETC		OTHER SYSTEM _____	
	STRENGTHS	WEAKNESSES	STRENGTHS	WEAKNESSES
COST	Low		Worth the difference	Will probably cost more
WORKSHOP FORMAT (including ease of implementation)	Very structured for those who like that	Too structured for a beginning intervention	Unstructured and non-directed	Will cause anxiety on trainees and trainers
MATERIAL CONTENT	Plenty of materials	Affective content is insufficient for getting at a lot of current problems	Fewer materials help them to put into practice what they already know	Trainees may want more materials so they can feel they are "learning"
PROBABLE SHORT-TERM EFFECTS	Each segment has some effects		Will get them started immediately on being responsible for their own problems	May be hard for them to identify the short-term effects. I may get fired
PROBABLE LONG-TERM EFFECTS	Built in capacity to continue	May cause them to become dependent	They will rapidly become responsible for their own system and behavior	I'll work myself out of a job
USEFULNESS TO CLIENTS	Very useful for what it sets out to do		Very useful. They'll really be able to have in-house capability to run their own show	

3. Please summarize your responses to #1 by checking the appropriate box on the scales below.

PETC			OTHER SYSTEM		
COST			**COST**		
[X] Reasonable	[ ] Somewhat Reasonable	[ ] Prohibitively Expensive	[X] Reasonable	[ ] Somewhat Reasonable	[ ] Prohibitively Expensive
WORKSHOP FORMAT			**WORKSHOP FORMAT**		
[X] Well-organized	[ ] Parts were Organized	[ ] Poorly Organized	[X] Well-organized by the trainees	[ ] Parts were Organized	[ ] Poorly Organized
MATERIAL CONTENT			**MATERIAL CONTENT**		
[ ] Comprehensive	[X] Adequate	[ ] Superficial	[X] Comprehensive	[ ] Adequate	[ ] Superficial
USEFULNESS TO CLIENTS			**USEFULNESS TO CLIENTS**		
[X] Useful for certain people	[ ] Somewhat Useful	[ ] Not Useful	[X] Useful	[ ] Somewhat Useful	[ ] Not Useful

Which would you recommend your client system select?

____ PETC first and then

____ Other System

Appendix F:

ALTERNATIVE SEARCH DOCUMENTS

Letter to Search Correspondents
Description of *PETC* Series for Correspondents
Information Request Form
Characteristics of the *PETC* Series
Abstracts of the Alternative Training Programs

November 19, 1975

Dear

The Improving Teaching Competencies Program, directed by Chic Jung at the Northwest Regional Educational Laboratory, is developing a series of training materials to enhance the learning environment in schools and in the classroom. One of the products being developed is *Preparing Educational Training Consultants (PETC)*, a three-part training program in process consultation and organizational development skills. Enclosed is a capsule description of the components of the *PETC* series for your information.

As a part of the evaluation of the *PETC* series, we are conducting a search for products that are alternatives to *PETC*. Preliminary steps in the search have identified you and your organization as having done work in the area of process consultation and organized change. We would like information about any products and training systems you have developed or are in the process of developing in these skill areas, and any workshops or training programs you present which are not available in a packaged form.

It is our intention to send copies of the completed study to persons and organizations who have contributed to its contents. We are not aware of any existing detailed, descriptive catalogue of process consultation training packages and programs, and we feel that this study can be a valuable resource for people working in this field. We are asking you, then, to be as complete as possible in the information you provide us. Specifically, we are requesting information on costs to participants, time involved, participant prerequisites, theoretical background, strategies used, expected outcomes, and results from any evaluation studies which have been done on the training system. We have enclosed a form and prepaid envelope for your convenience. Whatever information you can provide us will be appreciated.

Regards,

David A. Green
Research Assistant
Improving Teaching Competencies Program
Northwest Regional Educational Laboratory

Enclosures: 2

PETC-I: Skills Trainers Workshop is for diagnosis of *individual and group needs of educators in the area of process skills such as goal setting, communicating, influencing or decision making.* The *PETC* Skills Trainer has competencies in selecting, adaptively designing, conducting and assessing results of skills training exercises for such needs. His training prepares him to conduct *Group Process Skills (GPS)* workshops. It does not prepare him to offer other kinds of consultation or training services to a client system.

PETC-II: Consulting is for applying differential diagnostic techniques and differential intervention strategies in *helping a client system move through phases of an improvement effort.* The *PETC-II* Consultant forms a temporary relationship with the client system to add, or strengthen, a function needed to realize a value or attain a goal. The *PETC* Consultant is also involved in continuously rediagnosing his own competencies and deriving his explicit rationale for assuming the consultant role.

PETC-III: Organizational Development trains the consultant to apply further diagnostic and intervention techniques. Their goal is to facilitate normative and/or structural changes which *add and maintain improved functional capability of the organization.* Whereas the *PETC-II* Consultant temporarily supports needed functions, the *PETC-III* Organizational Developer helps to build them into the system permanently when appropriate and feasible. In addition, *PETC-III* consultants apply techniques which increase those functional capacities of the organization to add new kinds of objectives and utilize new kinds of resources.

Name of training package or program:

How is it made available to the public?

Number of participants (minimum-maximum):

Participant prerequisites:

Cost of the workshop for participants:

Time investment involved:

What is the theoretical basis for the workshop's content and strategies?

Describe the workshop strategies:

What are the expected outcomes (claims, disclaimers)?

If an evaluation study has been made on the training package, would you please send a summary of the results.

If there is a brochure for the training system, would you please enclose a copy.

For further information, whom should we contact?

Thank you.

David Green
Research Assistant
Improving Teaching Competencies Program
Northwest Regional Educational Laboratory

Characteristics of the *PETC* Series

I. Target Population

A. Practicing educators whose roles allow time for training and consulting--especially local school district, central office staff, administrators, counselors, group leaders, higher education faculty and state department of public education staff, or those who have reasonable aspirations to such a role.

B. Primarily education personnel--public, private, religious--all levels.

C. Groups of 12 to 18 participants.

D. Prerequisites include NWREL instructional systems: *Interpersonal Communications, Research Utilizing Problem Solving, Interpersonal Influence, Social Conflict and Negotiative Problem Solving,* or their equivalent, plus a training experience in system technology such as the Corrigan's version, *Systems Approach for Education.*

II. Content Provided in Training

A. Conceptual and theoretical material in the following areas: Diagnosis, selection, sequencing, adaptive redesigning and conducting of skills training exercises in such process areas as goals clarification, communications, decision making and conflict; planned change in group process consultation including phases, differential diagnosis, differential intervention and self-analysis and values consideration; individual and organizational development and evolution; organizational growth and maturity; educational purpose and functioning of educational organizations; interventions and strategies for working at organizational development and continued growth as a consultant.

B. Skills and techniques of diagnosing, selection, redesigning and conducting skill training exercises. Techniques for differential diagnosis and intervention in group consulting. Techniques for conceptualizing, diagnosing and intervening in organizational development. Skills and techniques for supporting growth of clients, colleagues and self in process consultation and organizational development.

C. Personal insight and derivation of meanings as planned part of professional growth.

D. When comparing with other training systems, content of prerequisites need to be considered.

III. Procedures and Strategies

A. Workshops include: small group skills training exercises; didactic reading and presentations; individual study, analysis and planning; pair, trio, intergroup and small group consultations and presentations with feedback; practice in diagnosis and intervention in individual and group process; exploration of professional values and philosophy; and, evaluation and self-analysis.

B. Practica and projects include direct work with client groups including evaluation feedback, critique by colleagues and supervision by senior trainers.

C. Emphasis is on peer learning groups developing norms and strategies for self-direction and supportive peer critiquing and interdependence. Senior trainer role is more to support the learning process than to provide content expertise. Content is provided in the *PETC* materials and other resource materials which are identified and retrieved as relevant.

IV. Expected Outcomes of Program

A. Familiarity with the main conceptual content of the three *PETC* instructional systems and demonstrable ability to use these materials and designs in training and consulting.

B. Clarification of motivation to work in this field with self-selection in or out during the sequence of training.

C. Individual identification of current strengths and weaknesses in process training and consulting.

D. For those whose professional roles reasonably support it, increased training and consulting activity.

E. Positive response from over 90 percent of trainees who enter these systems voluntarily with appropriate expectations.

F. Clearer conceptual and philosophical orientation in process training and consulting.

G. Some increase in clarity and skills in using interpersonal and problem solving techniques ala the prerequisites and techniques of skills training, diagnosis, intervention and organizational development strategy. Specific gains of this sort will be peculiar to individuals dependent on their past experience and experience called for as relevant to their practicum clients.

H. For those who continue in process training and consulting, collegial norms of continued collaboration in work and growth as a consultant and for continued self-initiative of professional growth in this field.

V. Trainers

Persons experienced in both structured (ala NWREL systems) and unstructured process training. Experienced in training process trainers. Experienced, as participant and trainer, with the three *PETC*s as well as the other NWREL prerequisite instructional systems plus alternative ways of providing such training. Skilled in designing as well as conducting process training. Familiar with the literature in this field.

VI. Dissemination

A. Initial strategy involved national network of NWREL regional representatives. Brochures have been used in targeted areas during development of the systems. Most involvement of participants has been planned within interested organizations by administrative personnel or by word of mouth leading to expression of desire to be involved.

B. The three *PETC* instructional systems are timed respectively as follows. *PETC-I*: five straight 9-hour days training of skills trainers followed by a 5-straight day practicum workshop. *PETC-II*: three 3-day, 9-hour days workshops conducted consecutively or with as much as two week interludes. *PETC-III*: five 4-day workshops conducted once every four to eight weeks. The prerequisites, which should be distributed before and between the *PETC* systems, involve 4- to 5-day workshops and 1- to 6-day workshops. These can be divided into 2½- to 3-day sessions with interludes for any particular workshop up to two weeks. This total sequence of training, then, involves 65 days of intensive workshop training, plus time involved in the organizational development project. This has been experienced as feasible for practicing educators when distributed over a 3-year period.

C. The average cost for a participant going through the 39 days of the three *PETC* systems in a nonresidential setting using an external senior trainer may be estimated as including $75 for materials and $750 toward costs for the senior trainer. This would be a fee of $850, which breaks down to about $21 per day of workshop training per participant.

D. Over 500 persons have completed *PETC-I* since development work began on it six years ago. Development work begain on *PETC-II* and *PETC-III* three years ago. Their use has been limited to evaluation needs of this development. During this three years, about 170 persons have advanced through *PETC-II* and about 50 persons have gone all the way through completion of *PETC-III*.

E. Academic credit from higher education institutions or state departments of continuing education has frequently been arranged for the *PETC*s and their prerequisite systems. In two settings, advanced degree programs have been offered based on this combination of training.

F. Evaluation reports created as part of the NWREL development of the *PETC*s may be purchased on request. These include both formative evaluation reports used to modify and improve the systems during their sequence of developmental revisions and summative reports made at the conclusion of development. The latter would be more relevant to potential users. Evaluation studies involved written questionnaires and interviews from participants during and after their training. Questionnaires and interviews from clients of the participants. Structured and unstructured observations of evaluators. Questionnaires and interviews with the senior trainers. Documentation of work done by participants in work with clients, for themselves and with each other. There were also reviews by outside experts.

Table A

A Comparison of 12 Alternative Instructional Systems in Process Training, Consultation and Organizational Development

Dimensions	Comparison Information
Instructional System or Program	Preparing Educational Training Consultants: Consulting PETC-II Northwest Regional Educational Laboratory 710 SW Second Avenue Portland, Oregon 97204
Target Population	Practicing educators in roles open to provide training and consultation Several areas and level of education In groups of 12 to 18 Prerequisites of 3 problem solving and 2 interpersonal skills workshops
Content Provided in Training	Use of skills training exercises for process issues Small group diagnosis and intervention for planned change improvements Organizational development theory and practice in education Self insight and professional growth
Workshop Procedures and Strategies	Workshops with range of theory and experiential learning activities Trainer supervision and interteam consultation Practicum with client groups for each team Diagnostic instruments and techniques Extended organizational development project Emphasis on peer learning groups
Expected Outcomes	Familiar with and able to use materials Clear motivation/self-selection Self-diagnosis and values consideration Increased training where role permits Positive toward training Clearer conception and philosophy Some increased practice skills Colleagueal norms among peers
Trainers	Experienced in structured and unstructured process training Experienced in training trainers Experienced with PETC-I, PETC-II, PETC-III and NWREL prerequisite systems as participant and trainer, knows literature
Dissemination	National network, brochures, word of mouth PETC = 39 workshop days plus 26 days of prerequisite workshops Average cost $21 per trainer per day 500 started, 50 completed limited offering of workshops in past 3 years of development Academic credit frequently offered Evaluation Reports available from NWREL

Dimensions	Comparison Information
Instructional System or Program	Process Approach to Planned Change Dr. Nick Colorell, President Center for Planned Change 2039 N. Geyer Road St. Louis, Missouri 63132
Target Population	Various school personnel Educational Teams of 4 to 8 up to total of 100 Prerequisites are selection by peers and according to personal characteristics
Content Provided in Training	Systems theory Value based planned change strategies Small group theory and planned change skills Management theory Planning skills Communication skills Development of plans and strategies
Workshop Procedures and Strategies	Theory input Team learning tasks Skill practica Team building Behavior contracts Evaluation Long-range planning
Expected Outcomes	Trained internal change agent consulting team Change in the organization including: Improved internal climate Organizational direction setting Organizational value clarification Adaptation in response to environment Human resource development
Trainers	One trainer per team "Center staff" or local trainer with "high level of experience" "Masters level education people" can become trainers
Dissemination	No particular strategy 10 days spread variably $50,000 to train 2 year OD program Between 500 and 750 trained Academic credit available Evaluation claimed

Dimensions	Comparison Information
Instructional System or Program	Advanced Consultation Skills Lab Social Science Education Consortium Boulder, Colorado
Target Population	Various educational roles Education Minimum group of 25 No prerequisites
Content Provided in Training	Skills practica on process issues Consulting issues Theory: Benne, Lewin, Moreno
Workshop Procedures and Strategies	Trainer lead whole group discussions and activities Demonstration and small group practice of skills
Expected Outcomes	Variable according to participants Practiced consulting skills, tools, methods Conceptualized consultation process, strategies Made backhome plans Explored value and causal consequences
Trainers	Ron Lippitt and Eva Schindler-Rainman
Dissemination	Brochures and word of mouth 3 days $135 - $45 per day Between 150 and 200 trained No academic credit No evaluation

Dimensions	Comparison Infomration
Instructional System or Program	Introduction to Organization Development Mathew Miles 94 Sparkill Avenue Tappan, New York 10983
Target Population	Any educators Education 8 to 35 participants No prerequisites "other than an interest in OD"
Content Provided in Training	Stages of an OD change effort as outlined in Schmuck and Miles, Organization Development in Schools
Workshop Procedures and Strategies	Theory input Small groups work through case study Role play Whole group discussion of diagnosis and intervention
Expected Outcomes	Cognitive clarity about OD Increased basis for making OD decision
Trainers	Matt Miles David Kellcher
Dissemination	Brochure 2½ days Usually $100 to $150 = $50 per day 100 to 150 trained No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Doctoral Program in Organizational Behavior Department of Organizational Behavior School of Management Case Western Reserve University Cleveland, Ohio
Target Population	Graduate students School of management 10 new students per year No prerequisites specified
Content Provided in Training	Conceptual and theoretical background to OD Personality theory and development process Interpersonal relations and group dynamics Organizational theory Large systems and cultural processes Methods and skills of applied behavioral science Personal development
Workshop Procedures and Strategies	Seminars Personal development groups Research and development projects Practicum in 2nd or 3rd year Individualized strategies Dissertation in 4th year
Expected Outcomes	"Broad based behavioral scientists" skills in: Teaching and research in OD OD planning and development Consulting Managing change Conflict resolution Laboratory training
Trainers	Faculty of 16 for 40 students
Dissemination	No strategy 3 to 4 years $2,850 for 2 semester years 57 Ph.D. graduates Ph.D. program No evaluation reported

Dimensions	Comparison Information
Instructional System or Program	Organizational Effectiveness Training Ms. Lee Douthit Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many field including education 9 to 24 participants One week of "laboratory experience" plus being in organization where learnings can be applied
Content Provided in Training	Strategies for data gathering and analysis Systems analysis Goal setting and planning change Methods for program evaluation Identifying and diagnosing organization ills Conflict coping strategies Organization theory
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals Backhome change project between 3 week long workshops
Expected Outcomes	Gather and use data Plan goals and priorities Develop methods of evaluation Problem solving Management of conflict Make a systems analysis Recognize effects of own and others behavior Internal consultant and manage OD Gain in self-confidence
Trainers	Ms. Eleanor Hill and assistants
Dissemination	Mailing and word of mouth 3 one-week workshops over 6 months $800 - $38 per day Between 75 and 125 trained No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Advanced Organizational Development Training Lab Consultant/Trainers Southwest Administrative Office P.O. Box 947 Emporia, Kansas 66801
Target Population	All levels of management personnel Many fields including education 9 to 24 participants Previous "OD training experience of at least several days duration"
Content Provided in Training	Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training organizational colleagues for using OD technology
Workshop Procedures and Strategies	Laboratory method of experiential learning Design evolves according to participant needs and goals
Expected Outcomes	Increased skills and insights in: Data handling Problem solving Decision making Communications Planning and implementing change Creating organizational atmosphere for change Training colleagues for using OD technology
Trainers	Trainers who are part of Consultant/Trainers Southwest network 3 trainers experienced in: Organizational consulting Personal growth Organizational development
Dissemination	Mailing list and word of mouth 6 straight days $230 - $38 per day Between 75 and 125 No credit No evaluation

Dimensions	Comparison Information
Instructional System or Program	Organizational Renewal Workshop--Gordon Lippitt, Developer Jacqueline Rumley, Executive Director Organizational Renewal, Inc. 5606 Lamar Road Washington, D.C. 20016
Target Population	Primarily line personnel or staff personnel who train others Various fields 12 to 24 participants No prerequisites
Content Provided in Training	Understanding growth potential of organization Developing communications in organization Developing organizational teamwork Coping with change Implementing renewal in an organization
Workshop Procedures and Strategies	Film for theory input Written "instrument" to guide learning Group discussion
Expected Outcomes	Participants will have: Diagnostic tools for analyzing organizations Practice in process skills Theory in organizational growth and communications A change project to initiate in their organization
Trainers	Network of 165 certified trainers Can train an "in-house" trainer Training trainer involves going through workshop plus 1 day briefing Certify only people who have basic trainer and group leader skills already
Dissemination	3 regional vice presidents and network of trainers, direct mailing 5 modules, each 3½ hours Cost of $150 to $250 = $60 per day No evaluation indicated

Dimension	Comparison Information
Instructional System or Program	Team Building and Process Consultation Rick Reichard, Director--Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	People active in applied behavioral science Various fields Minimum of 30 participants Must have completed an NTL "Advance Professional Development Learning Community Core Program"
Content Provided in Training	Process consultation using Ed Schein's book
Workshop Procedures and Strategies	Team building Case study Interteam consultation Theory building from experience
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days straight $350 = $70 per day No credit indicated Participant questionnaires used for self-ratings of program

Dimension	Comparison Information
Instructional System or Program	Program for Specialists in Organization Development John Adams, Director--Professional Development Division NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Mainly internal OD practitioners plus a few external and teachers of OD Various fields Maximum of 40 participants Must have a "basic lab" and NTL consultation or training theory and practice lab plus OD experience
Content Provided in Training	Professional and personal self-assessment OD theory, techniques, directions, ethics Dynamics of large and complex systems
Workshop Procedures and Strategies	Experiential learning Didactic cognitive inputs
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 2 weeks straight $700 = $70 per day No credit indicated Participant questionnaires used for self-ratings of program

Dimensions	Comparison Information
Instructional System or Program	Observation and Intervention in Work Groups Rick Reichard, Director--Center for Professional Development NTL Institute for ABS 1815 No. Fort Meyer Drive Arlington, Virginia 22209
Target Population	Anyone concerned with making work groups more effective Any field 12 to 24 participants Must have an NTL "Advanced Professional Development Training Community Core Program"
Content Provided in Training	Theories of intervention Conceptual maps for observing groups Group intervention
Workshop Procedures and Strategies	"Personal case papers" for theory building Observation of audio-taped groups Video-taped intervention simulations
Expected Outcomes	Not stated
Trainers	NTL staff
Dissemination	Mailing list 5 days $350 - $70 per day 45 trained No credit indicated Participant questionnaires used for self-ratings of program

Dimensions	Comparison Information
Instructional System or Program	Consultation Skills Seminar Scientific Methods, Inc. P.O. Box 195 Austin, Texas 78767
Target Population	Consultants, trainers, OD specialists Business and industry 8 to 32 participants Prerequisites "defined by the roles of the target population"
Content Provided in Training	"Consulcube" by Blake and Moulton Five intervention strategies Five units of change Four focal issues
Workshop Procedures and Strategies	Experiential learning Skill practice Case studies Pairing and small groups
Expected Outcomes	Participants will be: Experienced with "consulcube" Able to evaluate strengths and weaknesses of OD interventions Will have systematic approach to determining change interventions
Trainers	Only scientific methods personnel: currently 4 trainers in U.S. and 3 outside the U.S.
Dissemination	Mailing list and word of mouth 5 days $750 - $150 per day No credit Participants write critique of program

Dimensions	Comparison Information
Instructional System or Program	Internal Consulting Skills Workshop Gordon Lippitt, Developer Jacqueline Rumley, Executive Director Organizational Renewal, Inc. 5605 Lamar Road Washington, D.C. 20016
Target Population	Primarily, staff roles that influence program changes from nonauthority position Various fields 12 to 24 partcipants Prerequisite to be in position to use training in their work, prefer training experience
Content Provided in Training	Consulting/helping process 4 phases of consulting Skill practice on entry Tools of data gathering, model building and training methods Skill practica on entry Evaluation of consulting and personal growth
Workshop Procedures and Strategies	Diagnostic instruments Skill practice Case Studies Exercises Group discussion Application groups Presentations
Expected Outcomes	To have studied process of internal consulting To have studied how consulting steps are handled depending on relationship to system To have provided opportunities to design strategies or models to implement problem solving and development needs of organization
Trainers	Network of 165 certified trainers Can train "in-house" trainer Training trainer involves going through workshop plus 1 day briefing Certify only people who have basic trainer and group leader skills already
Dissemination	3 regional vice-presidents and network of trainers, direct mailing 3 days $150 to $250 = $50 per day In last four years, 750 trained plus 20 certified as trainers Academic credit sometimes arranged Self-evaluation at end of materials